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See note

AAM SOP

AAM DEFINITION

1. AAM at a Glance and Setup

- AAM can be accessed via this link XXXXX.
- AAM will only work in Chrome – do not use Internet Explorer or Edge.
- Before accessing the platform, you will need to send a request for the creation of your account access
- Login into AAM using your Microsoft credentials (same as Teams).

Welcome Page

Once you log in, you will land on the welcome page which will re-direct you to the application activity view where you can select your activities after you agreed to the terms of the disclaimer.

Commented [K1]: Decision Maker

Commented [K2R1]: Activities for Applications ready for finalization

Commented [K3R1]: Non Decision Maker cannot perform any action on this view

Commented [K4]: Non Decision Maker

Commented [K5R4]: Activities for Applications not ready for finalization

Commented [K6R4]: Decision Maker can perform action on this view

Commented [K7]: Selection of Application Activities

Commented [K8]: Selection of Client Activities

Commented [K9]: Assignment of selected Application Activities

Commented [K10]: Assignment of selected Client Activities

Commented [K11]: Change the status of the Activity to Complete

Commented [K12R11]

1. **Sign In:** Access the AAM tool via this link XXXXX in Chrome and Login using your Microsoft credentials.

2. **Welcome Page:** disclaimer page that appears once you log in and will re-direct you to the application activity view where you can select your activities after you agreed to the terms of

3. **Application Activity Tab:** This view is only intended for Decision Maker. All activities displayed here are for Application that are ready to be finalized. Only Decision maker can perform an action in this view.

    - IMPORTED DATA
    - DISPLAY OF DATA
    - CUSTOMIZATION OF DATA DISPLAY
- ACTIONS
    - NON DECISION MAKER
    - DECISION MAKER

- TRACKING OF ACTION
- ASSIGNMENT
- EXPORT DATA

- FEATURES
  - VIEWS
  - FILTERING/SORTING
  - ASSIGNMENT AAM
  - ASSIGNMENT/UNASSIGNMENT

- IMPORTED DATA
- DISPLAY OF DATA
- CUSTOMIZATION OF DATA DISPLAY

- ACTIONS
  - NON DECISION MAKER
  - DECISION MAKER
  - TRACKING OF ACTION
  - ASSIGNMENT
  - EXPORT DATA
- FEATURES
  - VIEWS
  - FILTERING/SORTING
  - ASSIGNMENT AAM
  - ASSIGNMENT/UNASSIGNMENT

s.16(2)(c)

- IMPORTED DATA
- DISPLAY OF DATA
- CUSTOMIZATION OF DATA DISPLAY
- ACTIONS
  - NON DECISION MAKER
  - DECISION MAKER
  - TRACKING OF ACTION
  - ASSIGNMENT
  - EXPORT DATA
- FEATURES
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  - ASSIGNMENT/UNASSIGNMENT

- IMPORTED DATA
- DISPLAY OF DATA
- CUSTOMIZATION OF DATA DISPLAY
- ACTIONS
  - NON DECISION MAKER
  - DECISION MAKER
  - TRACKING OF ACTION
  - ASSIGNMENT
  - EXPORT DATA
- FEATURES
  - VIEWS
  - FILTERING/SORTING
  - ASSIGNMENT AAM
  - ASSIGNMENT/UNASSIGNMENT

4.

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- IMPORTED DATA
- DISPLAY OF DATA
- CUSTOMIZATION OF DATA DISPLAY

- ACTIONS
    - NON DECISION MAKER
    - DECISION MAKER
    - TRACKING OF ACTION
    - ASSIGNMENT
    - EXPORT DATA
- FEATURES
    - VIEWS
    - FILTERING/SORTING
    - ASSIGNMENT AAM
    - ASSIGNMENT/UNASSIGNMENT

   c. IMPORTED DATA
   d. DISPLAY OF DATA
   e. CUSTOMIZATION OF DATA DISPLAY
5. ACTIONS
   a. NON DECISION MAKER
   b. DECISION MAKER
   c. TRACKING OF ACTION
   d. ASSIGNMENT
   e. EXPORT DATA
6. FEATURES
   a. VIEWS
   b. FILTERING/SORTING
   c. ASSIGNMENT AAM
   d. ASSIGNMENT/UNASSIGNMENT

   f. IMPORTED DATA
   g. DISPLAY OF DATA
   h. CUSTOMIZATION OF DATA DISPLAY
7. ACTIONS
   a. NON DECISION MAKER
   b. DECISION MAKER
   c. TRACKING OF ACTION
   d. ASSIGNMENT
   e. EXPORT DATA

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8. FEATURES
    a. VIEWS
    b. FILTERING/SORTING
    c. ASSIGNMENT AAM
    d. ASSIGNMENT/UNASSIGNMENT
9.

- ALL LOBs VIEW
    - IMPORTED DATA
    - DISPLAY OF DATA
    - CUSTOMIZATION OF DATA DISPLAY
- ACTIONS
    - NON DECISION MAKER
    - DECISION MAKER
    - TRACKING OF ACTION
    - ASSIGNMENT
    - EXPORT DATA
- FEATURES
    - VIEWS
    - FILTERING/SORTING
    - ASSIGNMENT AAM
    - ASSIGNMENT/UNASSIGNMENT

OTHER

Setting button

Personal customization

CUMULUS LINK

INDIRECT LINK

Data export through Excel csv file

Import of Excel csv file in Cumulus

DIRECT LINK

- Button in AAM (Send to Cumulus)
  - copy coded data on the clipboard and Users can directly paste in cumulus
- Button in AAM (Send to Cumulus)
  - Copy data from AAM and directly paste in Cumulus without Users intervention

OTHER LINK

FEEDBACK

- JL Email address
- Forum
- User manual
- Help function
- MS Teams chatt

CHINOOK1.5
October 20, 2021

CHINOOK 1.5 ROLL-OUT

Decision Maker Tool and Application and Activities Management

Chinook 1.5 - Officer Tool Rollout Plan*

H4

		PHASE 1					PLAN NEXT STEPS	PHASE 2
Stage	0	1	2	3	4	5	6	7
Proposed Dates: AAM - Officer Tool	**Oct 18-29**	**Nov 1 - 19**	**Nov 22 – Dec 10**	**Dec 13 – 31**	**Jan 3– 21**	**Jan 24– Feb 11**	**Feb 14 – Mar 4**	**Mar 7 +**
Stage Details	**Functional Testing – Production environment Testing of TRV fixes**	**CN Officers @ CPC-O + Chinook Area Expert @ Mexico**	**IN MPM/Chinook Area Experts @ Shanghai, Ho Chi Minh**		**IN MPM/Chinook Area Experts @ Warsaw, Nairobi, Paris, Vienna**	**CN Officers @ CPC-E**	**DJL and Networks Coordinate to plan next steps and review lessons learned**	**All IN offices + all applicable CN offices + All applicable DN offices**
Applicable officers	**Officers:** • 2-3 members of the TRV Journey Lab Officer/EDW	**Officers:** • IN Chinook Area Experts	**Officers:** • IN Chinook Area Experts		**Officers:** • IN Chinook Area Experts	**Officers:** • CN and DN Experts	**Officers:** • All networks	**Officers:** **TBD – based on IN input** **TBD – Based on CN input** **TBD – Based on DN input**
Missions	**Missions/Offices:** N/A	**Missions/Offices:** • Mexico	**Missions/Offices:** • Shanghai • Ho Chi Minh • Beijing • Manila • Singapore	BREAK	**Missions/Offices:** *TBD* • Warsaw • Nairobi • Paris • Vienna	**Missions/Offices:** • CPC-O • CPC-E • IRCC Edmonton	**Missions/Offices:** • All networks	**Missions/Offices:** **TBD – based on IN input** **TBD – Based on CN input** **TBD – Based on DN input**
Duration of stage	**10 days**	**3 weeks**	**3 weeks**	**3 weeks**	**3 weeks**	**3 weeks**	**3 weeks**	**3 weeks**
Breakdown of Stage Timeline	**Oct 18-29:** Testing functionality built up to Sprint 22 **Oct 18-29:** Training Baselining & Testing tools & methodology	**Intro & Training:** TBD **Focused Support** TBD-Nov 19	**Intro & Training:** TBD **Focused Support** TBD-Dec 10		**Intro & Training:** TBD **Focused Support** TBD-Jan 21	**Intro & Training:** TBD **Focused Support** TBD-Feb 11	**Brainstorm and Future Planning with networks:** TBD **Focused Support** TBD-Mar 4	**Intro & Training:** TBD **Focused Support** TBD

*Once we have rolled out to Chinook experts within Networks, roll-out within offices to occur based on direction from within IN.

Slide 2

H4 Edmonton is dependent on whether we have fixed EXT issues.
Harrison.Kevin, 2021-11-08

AAM Rollout Plan : Proposed Dates & Timelines *

			PHASE 1				PHASE 2	
Stage	0	1	2 **	3	4	5	6	7
Stage Details	**Develop AAM-TR Functionality**	**Usability, QA, QM and Bug Crushing in Chinook STG**	**PILOT - CN Officers @ CPC-O and select users abroad (TBD)**	**PILOT - CN Officers @ CPC-O and select users abroad (TBD)**	**IN Chinook Area Experts**	**Missions/Offices Associated with Chinook Area Experts**	**IN Areas + CN Area + DN Area**	**All IN offices + all applicable CN offices + All applicable DN offices**
Proposed Dates:	**Up to Nov 9**	**Nov 10-23**	**Nov 24 – Dec 15**	**Dec 16– Dec 31**	**Dec 27– Jan 14**	**Jan 17 – Feb 4**	**Feb 7 - 25**	**Feb 28 +**
Applicable officers	**Officers:** • TRV Officer Journey Lab Officer Lab	**Officers:**	**Officers:** • TRV Officer Journey Lab • SMEs		**Officers:** • CPC-O select users • IN-Select Users (TBD)	**Officers:** • All Chinook area experts and equivalents within CN.	**Officers:** **TBD – based on IN input** **TBD – Based on CN input** **TBD – Based on DN input**	**Officers:** • All IN Areas • All CN offices • All DN offices
Missions	**Missions/Offices:** N/A	**Missions/Offices:** N/A	**Missions/Offices:** • Select SME testers for feedback.	BREAK	**Missions/Offices:** • CPC-O • IN-Select Users (TBD)	**Missions/Offices:** • All Chinook area experts and equivalents within CN.	**Missions/Offices:** **TBD – based on IN input** **TBD – Based on CN input** **TBD – Based on DN input**	**Missions/Offices:** All
Duration of stage	**NA**	**10 days**	**3 weeks**		**3 weeks**	**3 weeks**	**3 weeks**	**3 weeks**
Breakdown of Stage Timeline	**To Nov 9:** Development up to Nov 9 (end of Sprint 24)	Finalize development of AAM MVP for release.	Test functionality of AAM-TR Tool delivered by TRV Journey Lab team Collect feedback for UX/Bugs		**Intro & Training:** TBD **Focused Support** TBD-Jan 14	**Intro & Training:** TBD **Focused Support** TBD-Feb 4	**Intro & Training:** TBD **Focused Support** TBD-Feb 25	**Intro & Training:** TBD **Focused Support** TBD-Mar 18

*Once we have rolled out to Chinook experts within Networks, we expect roll-out within offices to occur based on direction from within their respective networks. If decision taken is that AAM will be leveraged for FC Inventory management, we plan to have this undertaken concurrently through the "Chinook Champions" network.

Phase 1: Officer Tool Pre-Roll-Out

Time Period		Officer Tool	
April to May	1.1	Test in STG within the Journey Lab	1.1
	1.2	Test in STG with IN, CPC-O & CPC-E testers	1.2
	1.3	Identify, engage and train Officer Tool Champions	1.3
	1.4	Validate Chinook accessibility on GAC Network	
	1.5	Engage Change Management Consultants	
	1.6	Secure Microsoft Licenses	
	1.7	Develop Officer Tool User Manual & Training Videos	

Phase 2: Officer Tool Roll-Out an

Time Period		Officer Tool	
May to August	2.1	Test in PROD in Journey Lab	2.1
	2.2	Test in PROD in RROC, CPC-O & 3-5 IN Offices	2.2
	2.3	Fix Bugs as identified	2.3
	2.4	Improve Officer Tool UI/UX based on user Feedback	2.4
	2.5	Widen Officer Tool Roll-Out to Additional Users/Offices	2.5

Phase 3: AAM Roll-Out and Risk F

Time Period		Officer Tool	
September to November	3.1	Continue to improve UI/UX based on user feedback	3.1
	3.2	Officer Tool and AAM functionality is merged	3.2
	3.3	Files accessed via AAM-triaged bins	3.3
	3.4	Develop CPC-E functionality	3.4
			3.5

			3.6
			3.7

Phase 4: Acceleration of Automati

Time Period		Chinook Officer
November onwards	**4.1**	Expand automation of administrative tasks
	4.2	Applications triaged up-front based on business rules and risk indicators
	4.3	Activity-based processing expanded
	4.4	SCED Ground-to-cloud connection implemented.
	4.5	Explore AI functionality in compliance with Government of Canada guidel

Key Risks and Mitigatio

Key Risks
Lack of direct ground to cloud connection impacting performance - daily data uploads are currently incomplete (SP & WP only) and not up to date
Cumbersome two-step user account creation process slows roll-out
Competing priorities within Lab and IRCC risk inefficiencies, duplication of effort and internal competition for resources.
Pushback against use of new tool
Concerns automation could impact job security
AI development is slowed by Legal and reputational concerns

JL lacks resources to test and develop on tight schedule

' & AAM Tool Kick-Off

Application and Activity Management Tool (AAM)	Notes
Brainstorm with IN SMEs	Testers and trainers have been identified at CPC-O and IN Missions.
Requirements Gathering session with CN (CPC-E and CPC-O)	
Ongoing Engagement with IN SMEs to gather requirements	

d AAM Development

Application and Activity Management Tool (AAM)	Notes
Develop AAM in the Cloud	Positive feedback received from users at CPC-O, London and Warsaw. Availibility of users limited by competing priorities. Data upload and user account creation processes also slowing wider roll-out.
Identify, engage and train AAM Champions	
Test AAM in STG in Journey Lab	
Test AAM in STG with CPC-O, CPC-E and IN	
Develop AAM User Manual & Training Videos	

unction Development

Application and Activity Management Tool (AAM)	Notes
Test AAM in PROD in Journey Lab	MS Dynamics holds strong potential for efficiency gains to be made with a well-designed AAM fully leveraging automated work flows and activities.
Test AAM in PROD in IN and CN	
Release AAM MVP	
Test Automation Capabilities	
Widen AAM Roll-Out to Additional Users/Offices	

Risk Function Requirement Gathering	
Integrate Risk Indicators with AAM	

on via Ground to Cloud

Tool and AAM Work Fully Merged
lines

n Strategies

Mitigation Strategy
Requesting IT Security approval for MS Data Factory; engage EDW to find interim solution, though none yet identified. Chinook+ maintained as a backup. Gradual roll-out to test performance and identify potential problems quickly. SCED to be implemented in December.
Working with IT Ops to streamline and potentially automate the process.
Regular senior level engagement with Labs to emphasize importance of Chinook and user-centric development of officer tools.
Effective Change Management strategy that emphasizes how the tool will evolve based on user input. PWC engaged.
Clear communications surrounding what will be automated (administrative tasks) freeing up resources for more complex work
Engage key stakeholders early in the process; follow GoC guidelnes on AI

Temporary support from other Labs and IN as needed for testing, feedback and development

Cumulus Cookbook

All the recipes to answer all possible questions from our stakeholders

Last updated: 26/05/2022

Cumulus Cookbook

Chapters (in alphabetical order)

- Officers are concerned that history is limited to GCMS and does not include FOSS.
- DJL team needs to better disclose some of the limitations/weaknesses of the tool, like the lack of access to the FOSS history and need to be super clear about this.
- If not officers will make decision based on incorrect/incomplete information without realizing it. We could end up with major issues. This is a real show-stopper for processing complex cases. Recent experience on TRPs for a certain caseload, for example, officers noted that concerns were generally found in FOSS, not in GCMS history.
- In the roll out plan, what do they mean by 5% (or 20, 100) of overseas applications? Understand portion of the caseload, but would like to confirm
- In addition to that, considering not all applications are easy straight-forward cases, worried about the roll out goal of 100% of overseas applications. What does that mean? Will all applications have to be processed using the tool?
- Cumulus appears promising for processing simple cases. Otherwise, it could be difficult to use it with complex cases. For example, if there are adverse info in FOSS search / but not in Integrated Search, these may not all appear in Cumulus making the info in the tool unreliable or incomplete. Therefore, if they mean that Cumulus should be used for 100% of the caseload, not sure this is realistic (short term anyway).
- Is there a temporary save of the data on any notes taken or any actions taken by the officer if they don't save to GCMS before they leave and while they are still working on a case?
- Where is the temporary save of the data as officers work and is it ATIPable storage?
- How is inventory mgmt. done on the files an officers takes out, do they go back into to GCMS if they didn't finish the work on cases they pulled but didn't complete?
- Understanding is that officers will pull the files with PR Chinook (or from a functionality in Cumulus similar to Chinook) and input them in Cumulus. Then, the tool will pull all the required data and reorganise it for the officer to review. If the case has not been processed before the next pull from the tool/Chinook, the file will go back in the same bucket.
- Officers can see gains if ABP style or view is possible, say to look at all C decisions and relevant docs at one time. However, we need to have clear SOPS and processes to make sure ABP really works and make sense for all offices. In addition, offices need to follow SOPs, if not the ABP style will not work well and files will get lost/delay.
- Harvester has been used in some offices in North Asia in recent months and officers are able to mimic paper processing, referring back and forth to different supporting docs in a tabbed view with no time delay and no limit to number of docs or views of each docs. Concerns that Cumulus will not have this facility and might not prove to be as useful as Harvester gains (particularly on eligibility decisions). Ability to view and review e-apps is critical if we want people to get on-aboard and use it. **In short: If eDoc viewer is slow in Cumulus, and we cannot "flip" quickly through eDocs like Harvester, it will be tough transition. If eDocs viewer works well and doesn't lag, then we can see other concerns melting away.**
- **More specific feedback from Manila**: With that being said, when using Harvester, we have seen modest results for **increasing productivity** – it is faster to quickly flip through eDocs, opening multiple at a time per application. However, we have completed informal TIM studies for TR and PR pre-assessment – while TR has seen significant gains, it takes about the same time for PR pre-assessment (in our experience). Will need to complete another TIM when all digitized files are uploaded in a standard fashion (on-going discussions with CN). While we haven't done TIM for officers, most agree informally that processing a Harvested PR file it is much faster – **perception is reality.**
- In terms of baselining or testing, it is felt that the cognitive gains of decision making with the facility of Harvester to mimic paper processing might not be directly measurable. The officer cognitive experience and level of comfort can be documented anecdotally although affects the speed of the decision making process, which is related to but not directly measured by the speed of the information access through e-docs access. In simple terms, **being able to access all the information in a view that mimics paper has made the cognitive load on officers and therefore their comfort in decision making much improved**. **The e-doc viewer in Cumulus needs to provide access to multiple docs at a time without time delays that hinder cognitive processing and minimize distraction.**
- We suggest to analyse the number of clicks involved in processing an application (for officers). The concern is that it could be similar to GCMS or bring minimal gains over GCMS. Have clicks been considered? Because if it is not more efficient, people will not buy in. IN has mentioned the issue before and will raise this again. The bandwidth issue is real and intense overseas – clicks slows us down.
- Sponsorship information seems to take up a lot of real estate at a high level in the MVP and IN officers only ever need that information rarely. Is there a way for IN officers to filter this information out?

Information Management

Legal and litigation management

Privacy Impact Assessments

Program Integrity

Usability testing

- What is usability testing

CHAPTER: BUSINESS BENEFITS AND IMPACTS

Business Impacts

Business impacts of not deploying Integration to R27 (April 2022)

(1) Impacts integrity and efficacy of the Cumulus tool ultimately limiting the expected benefit of facilitated and streamlined processing of PR Family Class applications (including family reunification – a political priority) which contributes to achieving our Levels commitments.
(2) Limits adoption rate, (e.g., uptake and roll-out) of the Cumulus tool by PR Officers, again impacting scale of benefit to our Level's commitments.
(3) Limits adoption rate of the Cumulus tool by TR offices, impacting our ability to reduce processing times, reduce inventory, and effectively processing temporary resident applications; more specifically:
    a. Facilitation of temporary entry to help generate economic benefits
    b. Facilitating international student entry
    c. Achieving planned results for Core Responsibility 1 (visitors, students and temporary workers) of the DPR

If we do not implement this change it will hinder our progress in modernizing and increasing our processing efficiency with ever increasing volumes and targets. The status quo is not sustainable especially given the challenges we have seen in 2020 and 2021. We must push our department's goals of digitization and modernization so that IRCC can continue to meet its commitments to Canadians.

CHAPTER: CUMULUS

What is Cumulus?

Definition from the Cumulus User Manual (October 2021)

Cumulus is a cloud-base case processing tool to simply the application process, extract relevant information, and provide the ability to make assessments and take notes.

Definition from Cumulus System Profile Description (August 2021)

The Cumulus case processing tool application in an online web application that provides the ability to process Family Class applications, offers an Anchor view with key application statuses and organizes agents' workload. Cumulus enables the view of pertinent GCMS data and information, including online documents and client history, and the ability to make notes, determine eligibility and admissibility, and make final decisions.

This digital solution has been develop with specific focus on client service, user experience and digital design principals. The online application captures all of the necessary information, allows users to make and track PR family class decisions, view supporting documentation and effectively manage the agent's workload. The GCMS data is transferred via EDW data extract reports and processed in Cumulus – case processing client-centric model as part of MVP delivery.

Cumulus is developed as Secure Open API, accessible only within IRCC Network (restricted public), and leverages the case service backend. The access is by invitation only.

Definition from Cumulus IN Kickoff Deck (May 2022)

Cumulus is a cloud-based processing tool allowing IRCC employees to process PR applications outside of the GCMS.

Cumulus displays pertinent client and application information residing in GCMS and GCdocs in a more user-friendly way. It was designed to place users in control of the interface and enhance their interaction with the tool.

Key features:

- Ability to view application data with less clicks
- Ability to view GCMS notes
- Ability to view e-documents (and view multiple at the same time)
- Ability to draft notes, make assessments, an record decisions

Only users who have been registered and authenticated by Immigration, Refugees and Citizenship Canada (IRCC) are able to access Cumulus. Additionally, all data in Cumulus is encrypted and secured at all times.

CHAPTER: FAQ FOR CUMULUS

To support the launch of Cumulus for PR SCLP MVP

FAQ distributed to the Networks (August 2021)

BACKGROUND:

As part of the ongoing Departmental modernization strategy, the Permanent Residence-Spouse and Common-Law Partner Family Class Priority (PR SCLP FCP) lab is responsible for examining ways to improve the experience for both applicants and IRCC employees. The work in PR-SCLP FCP Lab is underpinned by three fundamental outcomes:

1. Working toward improving the end-to-end client journey and employee experience;
2. Enhancing features of the process that have a high impact on operations; and
3. Presenting new digital features to the process that can be implemented quickly from a technical standpoint.

In October 2021, the PR-SCLP FCP Program will take major steps forward in its modernization agenda with the launch of:

1) Inventory management tool to support workload distribution for IRCC employees; and
2) A PR Case Processing Tool (Cumulus) to support the decision-making process

What is being launched is a Minimum Viable Product (MVP), which has been developed by the PR-SCLP FCP Digital Journey Lab (DJL) in close collaboration with the International Network (IN), Centralized Network (CN), Domestic Network (DN), and many other branches.

Note: While there are several other ongoing digital initiatives within the Permanent Resident Program (such as the Digitization Pilot with Iron Mountain and the PR Digital Intake Portal), the information below focuses solely on the PR-SCLP FCP DJL MVP.

Table of Contents

The Digital Journey Lab

10. What are some of the other features that will be added to the MVP and in what timeframe?
11. How was it decided what features the PR-SCLP FCP would focus on for the MVP?
12. How was it decided who would participate in the ZBD and MVP workshops?
13. Why are there so many initiatives all at once?
14. How does the MVP relate to other initiatives taking place such as the PR Digital Intake Portal or the TRV officer tool?
15. What will be the next steps for the Digital Journey Lab?
16. Who will use the new PR Case Processing tool (Cumulus) and Inventory Management tool?
17. Why did the PR SCLP FCP DJL create a new Case Processing solution instead of leveraging Module 3 of Chinook?

Impacts

18. What will be the impact of the MVP on the processing officers and agents?
19. Will this impact my employment?
20. How are the impacts to employees being addressed?

Answers

1. What is a Digital Journey Lab (DJL) and how does it work?

A Digital Journey Lab (DJL) is a small cross-functional team of subject-matter experts who reimagine a client's end-to-end journey throughout a particular process (e.g., the PR Spousal application process) and then work in a collaborative, iterative, and agile manner to build digitally-enabled services to improve the experience. The Lab uses an Agile project management methodology, which means it operates with enhanced speed and agility to deliver small products in a rapid test-learn-release manner, adding additional functionality over time. IRCC currently has five DJLs focused on the following:

1) Temporary resident visa Lab

2) Citizenship Lab

3) PR-SCLP FCP Lab

4) MyAccount Lab

5) Study Permit Lab

2. Who is a part of the PR-SCLP FCP DJL? The DJL is a cross-functional team of designers, developers and business analysts dedicated full-time to the Lab. The Lab also engages with Subject Matter Experts (SMEs) from several branches within IRCC, including Operations, Strategic Program and Policy, Financial Operations, Transformation and Digital Solutions, Communications, and Legal, who provide their knowledge and expertise throughout the process. The CN, IN and DN SMEs also actively engage with their management to seek feedback when required. These individuals participated in various Lab workshops such as the Zero Based Design (ZBD) Workshop and Minimum Viable Product (MVP) Workshop, and

continue to participate in "Sprint"* reviews to provide their perspectives and input into what they would like to see built into the MVP. Finally, once the MVP is launched, those who use the MVP will provide invaluable feedback to the Lab that will be incorporated into future iterations of the product.

** The Journey Labs address one manageable goal at a time in short bursts of work called "sprints". Sprints are small, 1- to 2-week iterations of the solution that allow the Journey Lab to build and test, gain feedback, adjust the solution and shape the next sprint. As the sprints continue to roll out, the Journey Labs will build a minimum viable product of a digital client journey.*

3. Why was it decided that the PR SCLP FCP would be the focus of one of the DJLs?

Family reunification was identified as a Government priority on the Immigration Level Plans set out for 2020 to 2023. IRCC supports the Government of Canada's objective to reunite close family members by prioritizing the processing of spouses, partners and dependent children. Every year, thousands of Canadians and Permanent Residents initiate the process of sponsoring their family members and submit their applications in hopes of quickly reuniting with their loved ones in Canada. COVID-19 restrictions impacted our Department's ability to process paper-based applications, such as Spouse and Common-law partner class applications, and has rapidly increased the need to move digital, with increasing volumes and client inquiries.

The PR Spouse and Common-law Partner and Family Class Priority (SCLP FCP) Journey Lab was launched January 11, 2021 and endeavours to enhance the permanent resident end-to-end journey for spouses, common-law and conjugal partners, and address other client barriers with digital solutions. The PR SCLP FCP DJL will also aid with the new challenges COVID-19 has bought to the current system, the high volumes of client inquiries to different communication channels, increased volumes (and backlogs) and lengthy timelines for changes required to the Global Case Management System (GCMS) to enable more efficient processing.

4.What exactly is a Minimum Viable Product (MVP)?

A Minimum Viable Product (MVP) is the smallest product that can be built that delivers client and employee value. It is a working product that is simple, small scale, and **the foundation upon which additional functionality will be built.** The MVP is always evolving based on new insights from stakeholders, clients and employees, as well as more in-depth technical analysis. All of this will be incorporated into future product developments and improvements.

The MVP approach allows the development team to build the product with user input rather than building a final product from the onset and then having to make significant changes upon its release.

5. What is the PR SCLP FCP MVP?

The PR-SCLP FCP MVP consists of two main features:

1. **An Inventory Management Tool** that is dynamic and supports workload distribution for IRCC employees. The Lab will leverage the existing Chinook Module 1 tool that is currently used to support officers processing Temporary Resident applications.
2. **A PR Case Processing Tool (Cumulus)** for IRCC employees in a cloud environment outside of the (GCMS) that:
   - Displays pertinent information on the application (such as E-docs, GCMS notes, and previous applications);
   - Displays assigned cases;
   - Provides the ability to make assessments; and
   - Enables users to draft notes

6. Who is developing the PR SCLP FCP MVP?

The Inventory Management Tool, and the PR Case Processing Tool (Cumulus), were developed by the Transformation Branch's Digital Journey Lab, in close collaboration with the Immigration Program Guidance (IPG) Branch, Centralized Network (CN), International Network (IN), Domestic Network (DN) and many other branches.

7. What is the scope of the MVP and how will it be rolled out?

The scope of the MVP is the In-Canada and Overseas PR FC-1, FCC, and FCE applications. The MVP will first be rolled out for the overseas category of applications and shortly after, in the In-Canada category.

The roll-out plan for the PR-SCLP FCP Digital Lab will follow a set of guiding principles to ensure successful implementation.

- Roll-out will **begin with a small and targeted audience** and **expand incrementally** as milestones are achieved;
- The number of officers/agents using the MVP features will be **increased more rapidly or slower depending on how quickly milestones are met and readiness of the Networks**; and
- Officers/agents chosen for focus groups display **strong leadership qualities** and a **willingness to act as a change champion** to ensure successful at-scale adoption.

Overseas Applications: IN

A) Initial focus groups in the North Asia offices: scheduled for October 2021.

These focus groups will use the Inventory Management tool and the PR Case Processing tool (Cumulus) on a small number of overseas applications, provide initial officer/agent feedback, and indicate improvement in productivity and officer experience. Operational, client and technical milestones have been established that will support the tools to be rolled out to the rest of the overseas offices.

B) Progressive roll-out to other IN Areas in Q4 Fiscal Year(FY) 2021-22 to Q2 FY 2022-23

Overseas Applications: CN

A) Initial focus group in Centralized Intake Office- Sydney (CIO-S): scheduled for October 2021.

B) Focus group in Case Processing Centre- Ottawa (CPC-O): scheduled for December 2021.

C) Focus group in Case Processing Centre Mississauga (CPC-M): scheduled for January 2022.

The focus groups in CIO-S, CPC-O and CPC-M will use the Inventory Management tool and the PR Case Processing tool (Cumulus) on a small number of overseas applications, provide Initial officer/agent feedback, and indicate improvement in productivity and officer experience. Operational, client and technical milestones have been established that will support the tools to be rolled out to the rest of CIO-S, CPC-O and CPC-M.

The MVP will initially be rolled out to ~5% of overseas applications in the CN and scaling out will happen incrementally until it reaches 100% by Q2 FY 2022-23.

In-Canada Applications: CN

A) Initial focus group at CPC-M: scheduled for January 2022.

The focus group will use the Inventory Management tool and the PR Case Processing tool (Cumulus) on a small number of In-Canada applications, provide initial officer/agent feedback, and indicate whether there is an improvement in productivity and officer experience. Operational, client and technical milestones have been established that will support the tools to be rolled out to the rest of the CPC-M.

B) Progressive roll-out within CPC-M until the end of Q2 FY 2022-23

The MVP will initially be rolled out to ~5% of In-Canada applications in the CN and DN and scaling out will happen incrementally until it reaches 100% by end of Q2 FY 2022-23

In-Canada Applications: DN

A) Initial focus groups in pilot DN offices: scheduled for January 2022.

The focus group will use the Inventory Management tool and the PR Case Processing tool (Cumulus) on a small number of In-Canada applications, provide initial officer/agent feedback, and indicate improvement in productivity and officer experience. Operational, client and technical milestones have been established that will support the tools to be rolled out to the rest of the processing network.

B) Progressive roll-out within DN until the end of Q2 FY 2022-23.

The MVP will initially be rolled out to ~5% of In-Canada applications in the CN and DN and scaling out will happen incrementally until it reaches 100% by Q2 FY 2022-23

8. What training/tools will be provided to support those working with the MVP?

Training plans are currently being developed by the Digital Journey Lab. The DJL will be responsible for planning and overseeing the launch of official training and will take a “train the trainer” approach. This means that as representatives from the various impacted teams receive their training, they will then be equipped and responsible for delivering this training to their teams as the MVP continues to roll out.

More information on the training plan will be shared as soon as it is available. All those who need training will be trained, starting with the focus groups.

9. How will feedback from employees feed into further iterations of products?

The Lab is currently working with CN, IN and DN on the onboarding process, which will contain steps to follow to provide feedback to the Lab. The DJL is also in the process of creating a mailbox to receive feedback, suggestions and ideas from program partners. Until then, employees participating in the roll out plan(s) can provide feedback to their manager who can direct this to their DGO or area SME to forward to the Lab.

The DJLs also conduct weekly sprint reviews every Wednesday morning, which is another forum for feedback to be provided from the SMEs to the Lab. All of the questions, feedback and answers are added to a repository used to inform various deliverables, such as this FAQ document.

10. What are some of the other features that will be added to the MVP and in what timeframe?

Additional features to the MVP that are part of a one-year roadmap will be rolled out over time. Some examples of post-MVP release features include:

- **PR Digital intake tool**: Creation of a pipeline from the PR Digital Intake Portal to GCMS upon submission, with client documents linked. This will enable a smooth transition from digital applications to (GCMS).
- **Automated Client Notifications:** Increased communications with client by sending relevant notifications to clients advising them when certain actions are completed in the file
- **Document completeness:** Collaborate in building a mechanism to ensure complete submissions; initially only a simple query to check if files are uploaded but with opportunity to add functionality over time (e.g., real-time feedback).

The Lab will be undertaking planning and prioritization activities to determine the timeline for delivering each of the features in the one-year roadmap. Additional details to follow.

11. How was it decided what features the PR-SCLP FCP would focus on for the MVP?

The PR-SCLP FCP Journey Lab launched in January 2021 and shortly after, held two virtual workshops, involving people from across the Immigration Program.

The first was a virtual Zero Based Design (ZBD) Workshop, which generated more than 300 ideas to reimagine the future state of the end-to-end PR SCLP FCP journey (A Zero Based Design (ZBD) is a “sky's the limit” approach to reimagining the clients' experience). These ideas were consolidated and further explored in a second virtual workshop, the Minimum Viable Product (MVP) Workshop. Here, the participants ranked more than 40 ideas according to technical feasibility, desirability, and business value to IRCC. Based on the rankings in the MVP workshop, the Lab conducted further investigations into technical feasibility and organizational impact in order to refine the MVP. Ultimately, an Inventory Management tool and PR Case Processing tool were selected as the MVP as these features set the foundation for a digital end-to-end process. This recommendation was approved by Senior

Management.

12. How was it decided who would participate in the ZBD and MVP workshops?

A call-out was made to DGO's across the PR Spousal Program before the Lab launched seeking SMEs to bring their knowledge and experience to the Lab. SMEs and other representatives identified by the DGOs and the Lab were invited to the workshops.

13. Why are there so many initiatives all at once?

A number of projects have been in the works for some time and others have been accelerated in response to the COVID-19 pandemic, which has resulted in a number of initiatives becoming launch-ready at the same time. Although it is certainly not a best practice to roll them out so closely together, all of them are needed to effectively respond not only to the COVID-19 situation and the resumption of services but to the 2021-2023 Immigration Levels Plan set out by the Government of Canada.

14. How does the MVP relate to other initiatives taking place such as the PR Digital Intake Portal or the TRV officer tool?

This MVP is one of many Transformation initiatives that complement each other by setting the foundation for a completely digital end-to end experience for both staff and clients. The Processing tool feature of the MVP is the first tool connected to a cloud environment on Amazon Web Services (AWS) and will provide the proof of concept necessary for future projects to be located on the same system.

The PR SCLP FCP Journey lab works with SMEs from across the Department to collectively identify and develop tools and service enhancements in each line of business. The goal of the MVP is to introduce a PR family class component to the Chinook Inventory Management tool, build a cloud-based tool allowing decision makers to process applications outside of GCMS, and ensure a smooth **transition of digital applications** to GCMS, while actively participating in joint initiatives to enhance IRCC's approach in communicating with clients (PR tracker, client notifications).

The lab engages with stakeholders leading other initiatives, in order to strengthen, integrate and further our common endeavours, while limiting wastages. This allows the lab to have a horizontal approach in modernizing and digitizing the client and officer journey.

15. What will be the next steps/next projects for the Digital Journey Lab?

The PR-SCLP FCP DJL will continue to evolve the MVP based on feedback received from processing staff. This feedback will be incorporated into future iterations of the tools and additional features will be added based on the one year roadmap.

16. Who will use the new PR Case Processing tool (Cumulus) and Inventory Management tool?

Clerical and administrative employees, agents, officers, supervisors and managers across the Integrated Network. The PR Case Processing tool (Cumulus) can also be used by CSC staff.

17. Why did the PR SCLP FCP DJL create a new Case Processing solution instead of leveraging Module 3 of Chinook?

The Lab team conducted an options analysis of the technology architecture availability and feasibility that included MS Dynamics (technology used by Chinook). Based on this assessment and business needs, the Amazon Web Services (AWS) architecture was chosen for its abilities to more easily communicate with various digital solutions (for example: integration service end point to view documents from GCDOCS). In addition, AWS allows for implementation of a client centric model, meaning that Cumulus can be used for any line of business giving the advantage in code, service reusability and faster time to market.

Impacts

18. What will be the impact of the MVP on the processing officers and agents?

The PR Case Processing tool (Cumulus) creates a user-friendly digital processing experience. Decision makers will be able to:

- View all applications assigned to them, helping them to assess and prioritize workload;
- View previous application history;
- View e-documents uploaded to GCMS;
- View GCMS case notes;
- Spend less time navigating from screen to screen;
- Quickly see key indicators, such as adverse information, to more effectively approach the processing of the application; and
- Update information directly in the tool, such as actions and notes.

The Inventory Management tool will:

- Offer a more effective and automated way to manage the inventory, triage activities and applications, and distribute the workload.

19. Will this impact my employment?

No. The PR-SCLP FCP MVP will modernize work methods through new tools that will allow employees to retrieve and review applications, while also providing the flexibility to perform work remotely. As with

any change, a period of transition is expected that will include comprehensive training and adaptation.

20. How are the impacts to employees being addressed?

There is a formal Change Management team, the Transformation Change Management Office (TCMO), which has been engaged with the PR-SCLP FCP Lab team from the beginning, ensuring that change is done right. This team has identified the impacts that the changes will have on staff and has developed a Change Management Plan that includes Change Communications and an assessment of the training needs of processing officers and agents to ensure they are supported through the launch of the MVP.

FAQ for Change Management

<u>Comments on FAQs pertaining to Cumulus Change management (September 2021)</u>

1. Will the tool become mandatory at some point?
   Lab comment: Cumulus is being built to support the department's endeavours to introduce greater digitization and modernized solutions. Cumulus was designed and developed in close collaboration with key stakeholders identified by each branch, including employees (such as officers) in each section of the Integrated Network. The intent is to incrementally increase usage of Cumulus, as the tool evolves and functionalities are enhanced, so that 100% of the PR FCP SCLP applications interact with Cumulus during the processing continuum (aspirational goal). We are concerned with the optics of the Lab providing functional directional pertaining to mandatory use. This direction should come from the Integrated Network.

   Or will the offices/officers be able to choose to use it or not?
   Lab comment: This type of direction should come from the Integration Network. From our perspective, we've agreed to a roll-out plan for full deployment of the tool. The first iteration of Cumulus may not have all the functionalities for all activities within a complex case, but we believe that some functions will still be useful (such as the document viewer) when reviewing complex cases. Cumulus will continue to evolve as the lab will incorporate new functionalities based on feedback, comments and suggestions received by Cumulus end-users, stakeholders and subject matter experts.

   How can we encourage officers to use it without making it seem it's forced?
   TCMO Comment: We can actively encourage officers to use the tool by clearly articulating why we are developing a new digital tool for these lines of business, and ensuring processing agents and officers have the appropriate information, understand WIIFM, and receive training and support to be able to adopt and support uptake of the new tool. The objective through Change management is to create buy-in as well as provide opportunities for stakeholder to share feedback on their experience of the change so that change is not perceived as being imposed but rather that they are participating in the process. All of these elements are conveyed through the Change Management Plan developed in support of the lab and Recommended Change Management Activities presented to the Networks.

2. What if the tool does not help us gain in productivity?
   Lab Comment: We don't anticipate the networks will see sizeable productivity gains at first, given the need for training, the adaptation period, gaining trust in the tool, and QA activities. We are currently developing a metrics plan and will be sharing it with our SMEs. As a first step, we want to capture qualitative metrics and once users become more familiar with Cumulus, capture quantitative metrics. Our lab will continue to iterate and enhance the functionalities in Cumulus to address productivity metrics. This will be an iterative and collaborative process; we are committed in building the right tool for IRCC employees, based on IRCC employee feedback.

   This question was raised because we know it will be asked eventually. Some are worried that this is going to be another GCMS roll out. How can we reassure them?
   Lab comment: The lab has consistently engaged with stakeholders in all branches of IRCC, including Operations. Cumulus was designed and developed in close collaboration with key stakeholders identified by each branch, including officers in each section of the Integrated Network. Several hours of research with operations employees (decision-makers, clerical staff, supervisors) were conducted; regular design meetings with identified operation stakeholders were completed; weekly sprints were conducted; usability tests were completed with the operations end-users; and feedback has consistently been taken into consideration when designing and developing the tool. Cumulus was designed with the end-user experience as the core premise. The Lab will continue to solicit feedback from the end-users, conduct usability tests, and enhance the tool based on desirability, viability and feasibility criteria identified and supported by the IRCC internal stakeholders and subject matter experts.

3. Our understanding is that Cumulus will not pull FOSS/CAIPS history, not at this point (it may come later).
   Lab Comment: This affirmation is accurate and has been shared when explaining the GCMS Cases and Application feature.

   Officers are concerned that history is limited to GCMS and does not include FOSS.

   Lab Comment: Correct, the information is limited to what appears in the GCMS Application and Case Tab. We did not build an Integrated Search feature (as it was far too complex as an MVP), where FOSS and CAIPS information can be accessed. This does not replace the need of using the integrated search function.

   DJL team needs to better disclose some of the limitations/weaknesses of the tool, like the lack of access to the FOSS history and need to be super clear about this.

   Lab Comment: The lab continues to be transparent in disclosing limitations of Cumulus during its ceremonies and other meetings with stakeholders. The lab and IPG are creating a Cumulus User Manual and Standard Operating Procedures which will provide information on Cumulus. Both of these resource manuals have been distributed to our stakeholders for comments. These

resources will be delivered before Cumulus is launched and will provide clear information on the tool's functionalities.

If not officers will make decision based on incorrect/incomplete information without realizing it. We could end up with major issues. This is a real show-stopper for processing complex cases. Recent experience on TRPs for a certain caseload, for example, officers noted that concerns were generally found in FOSS, not in GCMS history.

Lab comment: Officers should continue to use all tools available at their disposal to make informed decisions on correct and complete information. For MVP, we aim to deliver the smallest product we can build that delivers user value, not delivering a fully finished product. The lab adopted an Agile approach to product development; Cumulus will continue to evolve through several iterative deployments. Given the high approval rate for PR FC1 and FCC applications, the first iteration was developed to support decision-making for less complex cases in order to potentially have a greater initial impact on a larger portion of the caseload.

4. In the roll out plan, what do they mean by 5% (or 20, 100) of overseas applications? Understand portion of the caseload, but would like to confirm

   Lab comment: Volume of applications

   In addition to that, considering not all applications are easy straight-forward cases, worried about the roll out goal of 100% of overseas applications. What does that mean? Will all applications have to be processed using the tool?
   Lab comment: This roll out plan and goal were shared with our stakeholders throughout the edification of the business case and roll out plan. The intent is to incrementally increase usage of Cumulus, as the tool evolves and functionalities are enhanced. The *100% goal* is aspirational and based on our ability to keep delivering functionalities to support processing. The first iteration of Cumulus may not have all the functionalities for all activities within a complex case; users must still leverage GCMS for certain activities. However, we believe that some functions will still be useful (such as the document viewer) when reviewing complex cases. The MVP 1 version of Cumulus is not the final version; other functionalities will be added in future iterations.

   My two cents: Cumulus appears promising for processing simple cases. Otherwise, it could be difficult to use it with complex cases. For example, if there are adverse info in FOSS search / but not in Integrated Search, these may not all appear in Cumulus making the info in the tool unreliable or incomplete. Therefore, if they mean that Cumulus should be used for 100% of the caseload, not sure this is realistic (short term anyway).

5. Is there a temporary save of the data on any notes taken or any actions taken by the officer if they don't save to GCMS before they leave and while they are still working on a case?
   Lab Comment: All of the notes, assessments and actions completed in Cumulus are temporarily saved while the officer remains actively logged in the tool. All data temporarily saved into Cumulus will be deleted once the officer logs out or is timed out for inactivity (following 8 hours

of inactivity). Officers should be transferring their notes, assessments and actions to GCMS before they log-out / are timed out.

Where is the temporary save of the data as officers work and is it ATIPable storage?

Lab comment: It is saved in the cache only for the duration of the session. Cumulus is saving basic information about agent/application/document access via audit logs. This is ATIPable. Draft notes and assessments are not saved in Cumulus , only temporary stored and therefore not ATIPable. The ATIP functionality for notes and assessments is still via GCMS at the point in time when the agent saves the notes and assessments in GCMS.

6. How is inventory mgmt. done on the files an officers takes out, do they go back into to GCMS if they didn't finish the work on cases they pulled but didn't complete?

Lab comment: GCMS data extracts occur every 12 hours. The officer (or supervisor, agent, etc.) will leverage AAM to pull their applications. Each offices will need to determine the frequency and amount of files they assign to their officers (e.g. 5 files per day

per officer as a starting point). Any work done in Cumulus must be transmitted to GCMS in order to update the application in GCMS. If no work has been done, the application(s) in GCMS remain unchanged and will be pulled accordingly in the next GCMS data extract to

populate AAM. These applications will be available in the AAM tool after following data extract.

Understanding is that officers will pull the files with PR Chinook (or from a functionality in Cumulus similar to Chinook) and input them in Cumulus. Then, the tool will pull all the required data and reorganise it for the officer to review. If the case has not been processed before

the next pull from the tool/Chinook, the file will go back in the same bucket.

Lab Comment: Officers will leverage AAM to view the inventory (organized in buckets/activities) and will extract applications for processing. These applications will need to be inserted (copy/paste) into Cumulus. Once the applications numbers are inserted into Cumulus,

Cumulus will interact with the secure location where the EDW data is stored, and populate the Cumulus tool for officers to begin their review/assessments. If the case has not been processed after the Chinook and Cumulus pulls, it remains unchanged in GCMS. As such, the during the next data extracts (for AAM) will return to the same bucket and (for Cumulus) remained unchanged. Note: Updates from GCMS will be reflected after Chinook data is updated the following day (next extract after updates were saved in GCMS).

7. Officers can see gains if ABP style or view is possible, say to look at all C decisions and relevant docs at one time. However, we need to have clear SOPS and processes to make sure ABP really works and make sense for all offices. In addition, offices need to follow SOPs, if not the ABP style will not work well and files will get lost/delay.
   Lab Comment: SOPs have been drafted and are being updated following a first review with the networks.

8. Harvester has been used in some offices in North Asia in recent months and officers are able to mimic paper processing, referring back and forth to different supporting docs in a tabbed view with no time delay and no limit to number of docs or views of each docs. Concerns that Cumulus will not have this facility and might not prove to be as useful as Harvester gains (particularly on eligibility decisions). Ability to view and review e-apps is critical if we want people to get on-aboard and use it. **In short: If eDoc viewer is slow in Cumulus, and we cannot "flip" quickly through eDocs like Harvester, it will be tough transition. If eDocs viewer works well and doesn't lag, then we can see other concerns melting away.**

Lab Comment: Duly noted. We wanted to add an effective document viewer in Cumulus as a foundational piece, given the feedback we heard from our subject matter experts. Having an effective document viewer is critical. MVP 1 will see the release of Cumulus' first iteration

of this viewer. The lab will continue to work with stakeholders to build and enhance new functionalities and abilities for Cumulus, based on desirability, feasibility and value. We will continue to explore the tools that are currently available and being used, solicit user input and

comments, to then examine the best solutions for the Cumulus tool.

   a. **More specific feedback from Manila**: With that being said, when using Harvester, we have seen modest results for **increasing productivity** – it is faster to quickly flip through eDocs, opening multiple at a time per application. However, we have completed informal TIM studies for TR and PR pre-assessment – while TR has seen significant gains, it takes about the same time for PR pre-assessment (in our experience). Will need to complete another TIM when all digitized files are uploaded in a standard fashion (on-going discussions with CN). While we haven't done TIM for officers, most agree informally that processing a Harvested PR file it is much faster – **perception is reality.**
      Lab comment: We want to introduce time and motions exercises to capture an update baseline of activities and timing without leveraging Cumulus and compare it to timing using Cumulus (once officers are more familiar with Cumulus)

9. In terms of baselining or testing, it is felt that the cognitive gains of decision making with the facility of Harvester to mimic paper processing might not be directly measurable. The officer cognitive experience and level of comfort can be documented anecdotally although affects the speed of the decision making process, which is related to but not directly measured by the speed of the information access through e-docs access. In simple terms, **being able to access all the information in a view that mimics paper has made the cognitive load on officers and**

therefore their comfort in decision making much improved. **The e-doc viewer in Cumulus needs to provide access to multiple docs at a time without time delays that hinder cognitive processing and minimize distraction.**
Lab Comment: Duly noted. The lab will continue to develop and enhance the document viewer in Cumulus.

a. **To add to the above,** perhaps most significantly, Harvester has also been a **boost for wellness and employment satisfaction** –being able to mimic paper file processing, a return to that comfort level, has been helpful in these challenging days. Adds back predictability to individual productivity, which is easier for support staff and officers to manage their time and expectations. Therefore, even if there are not significant productivity gains, Harvester is a much more comfortable, predictable, and less frustrating experience.

10. We suggest to analyse the number of clicks involved in processing an application (for officers). The concern is that it could be similar to GCMS or bring minimal gains over GCMS. Have clicks been considered? Because if it is not more efficient, people will not buy in. IN has mentioned the issue before and will raise this again. The bandwidth issue is real and intense overseas – clicks slows us down.
Lab comment: Cumulus has been designed and developed with a strong User Experience lens. Reducing the number of clicks was an essential component. However, we are not committing to analysing the number of clicks at this time. We like the idea, and need time to look at the feasibility of this. I suspect counting clicks will have considerable impact on the networks.

11. Sponsorship information seems to take up a lot of real estate at a high level in the MVP and IN officers only ever need that information rarely. Is there a way for IN officers to filter this information out?
Lab Comment: Cumulus has been designed for wide audience within the Integrated network. Part of the design is also navigation bar that allows officers to go directly their section of relevance. Each Sector can navigated and view the information only relevant to them. We will keep refining in future iterations.

CHAPTER: USABILITY TESTING

What is Usability testing

Usability Testing during Bug Crushing (July 2021)

Usability testing is an observational methodology typically used by UX researchers (designers) to uncover problems and discover opportunities in design. It will also allow our lab to observe and learn our users behaviours and preferences as they interact with Cumulus.

Each user will work with a dedicated lab designer, who will facilitate the 1 hour session. Users will be asked to perform some functions in the Cumulus tool with little guidance. The designer will give instructions and asks task scenarios. Users will provide feedback about the interface as they perform these tasks. These will be realistic activities that the user might perform during the course of their regular duties (no trick question about exceptional situations). This will allow us to assess the how users are interacting with the tool, how intuitive the tool is, and determine how we can keep enhancing Cumulus.

Although we will be sharing the user manual and SOPs prior to the bug crushing session, we would ask that users not refer to these documents during the usability testing session. We recognize this may be uncomfortable for some users, especially that this will be the first time they interact directly with Cumulus. We will re-iterate before the session that this is neither a performance evaluation nor a reflection on their abilities. Rather we want to see if we on the right track with our user experience goals.

We are also hoping to record these usability testing sessions. We will only be recording the screen share and audio.

- **Why do we need to record?**
  Post usability testing the design team analyzes the findings and converts them into redesign recommendations for the next iteration of Cumulus. Recorded usability sessions make an impactful difference and ensure 100% accuracy when trying to identify key themes and areas of improvement. We want to record to better understand the needs of the users which will make Cumulus a better tool for our agents.
- **When will the recording be deleted?**
  After synthesis is complete.

In preparation for the usability testing and during the bug crushing, could officers have a few applications numbers available?

Preferably straight forward applications (added bonus if there are some with dependents).

Standard Operating Procedure

DLJ 3: FAMILY CLASS PR

Immigration Program Guidance
UPDATED ON OCTOBER 6, 2021

Table of Contents

1. Purpose

The purpose of this Standard Operating Procedure (SOP) is to assist users in utilizing the newly created Cumulus tool with regards to the review of family class applications.

2. How it Works

[Cumulus Version 1] The current iteration of Cumulus offers a consolidated view of an application. It seeks to provide a more user-friendly and expedited processing experience for officers. Enterprise Data Warehouse (EDW) extracts data from the Global Case Management System (GCMS) which is then pulled into the Application and Activity Module (AAM). Officers then retrieve their assigned applications from the AAM and can process within the Cumulus environment. Applications that are assessed within Cumulus will still need to be copy and pasted into GCMS once complete. Office-specific processing procedures should be followed and incorporated into the tool.

NOTE: AAM will not be available for the launch of MVP1. Teams should continue to use existing triaging systems. Contact your team lead for any questions.

Limitations

- Cumulus will not pull FOSS or CAIPS history
- Cumulus only pulls information that appears within the GCMS Cases and Applications tab. Case processors should continue to use the integrated search function within GCMS if/where necessary.

Reminder: All of the notes, assessments and actions completed in Cumulus are temporarily saved while the officer remains actively logged in the tool. All data temporarily saved into Cumulus will be deleted once the officer logs out or is timed out for inactivity (8 hours). Officers should be transferring their notes, assessments and actions to GCMS before they log-out or are timed out.

2.1 Effective Date

The effective date of this Standard Operating Procedure is October 25, 2021 which coincides with the release of the Cumulus.

Version	Date	Authored/Revised By	Nature of Revisions
1.0	2021-07-02	Alexandra Ng-Yong, Noemie Daoust-Pinel, Pooja Patel	First draft
1.1	2021-09-13	Alexandra Ng-Yong and Noemie Daoust-Pinel	Second Draft
These SOPs have been reviewed by the Centralized Network, the International Network, the Domestic Network, Integrity Risk Management Branch, Transformation			

3. Cumulus Overview

Structure:

A. Import applications from AAM's exported excel list or enter individually.

B. Use the summary list to see your assigned applications.

The table includes a brief synopsis of the applications as well as their current status as pulled from GCMS. **This tool only has viewing propriety, if you need to make a decision or change an assessment (eligibility, admissibility, final decision) on a file you still have to do it in GCMS. You cannot add any sub activities.** You can select applications by ticking the corresponding box and can remove them from the dashboard by clicking 'Delete'. This does not affect the application within GCMS.

Applications are sorted in two categories in order to keep the workload organized: "To Do" and "Reviewed". Applications within the "To Do" tab include all applications that must be assessed. The "Reviewed" tab includes those that you have already assessed. All applications that have been assigned to the case processor within the tool will be removed once you log out of Cumulus.

C. Shows all the files that are added to Cumulus and ready to be assessed.

D. A page where files can be added and shows files that are ready to be assessed.

E. Shows all the files that are done being assessed in a single session.

F. Relevant and precise information of the particular application will be viewed in Application View. Here, you can navigate between sections, view content, and make an assessment. Pages are divided into the steps of an assessment. Within each step of the assessment, you can view the requirements for the clients, summary notes, and documents. (See Figure 2: Cumulus Application view).

G. Action panel that lets agent take notes and choose an assessment. Please note: Cumulus does not store data. Agents are required to transfer the assessments and notes made in Cumulus to GCMS before signing out/ are timed out.

Once you click on an application from the dashboard, you are brought to the Application View. Here, you can navigate between sections, view content, and make an assessment. Pages are divided into the steps of an assessment.

Within each step of the assessment, you can view the requirements for the clients, summary notes, and documents.

- **Requirement section:** This view will contain all the detailed information for the respective client. These details come from GCMS and contain a compound summary of the Client, their Status in Canada, contact information, marital status, previous applications and cases, statutory questions and Marital Status History, so that the user can easily assess and make a decision.
- **Summary Section:** This view will display the history of notes including application and UCI notes for the respective client. This section intends to give the users a quick recap of the decisions and information that has been made/collected on that particular file.
- **Documents section:** This view is divided into 'Incoming' and 'Outgoing' sections. The incoming section will have all the forms, documents and correspondence that the client sends to IRCC where an eDoc exists that can be viewed. The outgoing section will have all the correspondence or requests sent to the clients, where an eDoc exists that can be viewed.

4. Steps of an Assessment

The general steps of an assessment a user can follow is as below. As Cumulus is an activity based tool, there can be users who are looking to finish a specific task in Cumulus and not follow the whole step. Referring Figure 2:

1. **General Information:** This section will contain an overview of the client's application, the SPR, PA and Dependent(s) - if any, summary and the representative information. If applicable, IMM5475 can be found under Sponsorship Eligibility > Documents > Incoming Documents. If the document is available as an eDoc it can be viewed directly in Cumulus, if not, a message will appear indicating it is available in GCMS.

   General section – Has the Application details - application number, category, subcategory, Special programs, information on if the sponsor is ineligible and the associated application information.

   Fees – has the fees information – Cost recovery, RPRF

   Destination – Has the client's destination info – Province of destination and CSQ info when applicable

   File Info – contains the lock in date, file assigned by and assigned To information

   Clients – The client info table contains information of all the clients in the file – SPR, PA and dependent(s) if any. This table provides details of – Name, UCI, Age at lock in date, Status in Canada, Citizenship and COR details.

   Rep Info – This section will only have information if there is a representative on file. The info will indicate whose representative the rep is, their Party ID, Type, Governing Body, Membership number and the contact information.

   GCMS Mappings: Please refer to the Mappings section to view which field from GCMS is displayed in Cumulus. GCMS Mappings.

s.16(2)(c)

Figure 3: General Information View

2. **Sponsor Eligibility:** This section will contain all the detailed information regarding the Sponsor. You will be able to view the overall requirements to assess the sponsor, their documents/correspondence and a summary of notes. **If any assessment are made, the user will need to reflect these assessments into GCMS.**

Within this section, you will find information on:

1. General
2. Contact Info
3. Application and Cases
4. Statutory Questions
5. Relationship History
6. Benefits
7. Criminality
8. Misrepresentation

GCMS Mappings: Please refer to the Mappings section to view which field from GCMS is displayed in Cumulus. GCMS Mappings.

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3. **Applicant Eligibility:** This section will contain all the detailed information regarding the Applicant's Eligibility. You will be able to view the overall requirements to assess the applicant's eligibility, their documents/correspondence and a summary of notes. **If any assessment are made, the user will need to reflect these assessments into GCMS.**

   Within this section, you will find information on:
   1. General
   2. Client ID
   3. Contact Info
   4. Application and Cases
   5. Relationship History

   GCMS Mappings: Please refer to the Mappings section to view which field from GCMS is displayed in Cumulus. GCMS Mappings.

4. **Applicant Admissibility:** This section will contain all the detailed information regarding the Applicant's Admissibility. You will be able to view the overall requirements to assess the applicant's admissibility, their documents/correspondence and a summary of notes. At the moment, Cumulus does not allow the user to update or change admissibility decisions in the tool. Please use GCMS for this purpose.

Within this section, you will find information on:

1. General
2. Client ID
3. Contact Info
4. Applications and Cases
5. Security
6. Criminality
7. HIRV
8. Misrepresentation
9. Info Sharing
10. Medicals

GCMS Mappings: Please refer to the Mappings section to view which field from GCMS is displayed in Cumulus. GCMS Mappings.

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5. **Dependents:** This section is a subsection under Applicant Admissibility and will only appear if there are any dependents on the file. You will be able to assess all the dependents in this section. Contents within this section will vary between dependants that are under 18 and those that are over 18 years old. **If any assessment are made, the user will need to reflect these assessments into GCMS.** .

   Within this section, you will find information on:
   1. No. of dependents
   2. General
   3. Client ID
   4. Applications and Cases
   5. Security
   6. Criminality
   7. HIRV
   8. Medicals
   9. Misrepresentation
   10. Info Sharing

   GCMS Mappings: Please refer to the Mappings section to view which field from GCMS is displayed in Cumulus. GCMS Mappings.

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4.1. Tab Views

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Please note: The summary section will not display the restricted notes. To access that, please refer to GCMS.

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5. Reviewing an application

For PA assessment:

Pages 66 to / à 79

are withheld pursuant to section

sont retenues en vertu de l'article

16(2)(c)

of the Access to Information Act

de la Loi sur l'acces a l'information

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CUMULUS Tool Standard Operating Procedures (SOPs)

Table of Contents

1. Purpose

The purpose of this Standard Operating Procedure (SOP) is to assist Agents in utilizing the newly created Cumulus tool with regards to the review of Spouse, Common-Law and Partner applications.

1.1 How it Works

[DATE or Version #] The current iteration of Cumulus offers a consolidated view of an application. It seeks to provide a more user-friendly and expedited processing experience for officers. Enterprise Data Warehouse (EDW) extracts data from the Global Case Management System (GCMS) which is then pulled into the Application and Activity Module (AAM). Officers then retrieve their assigned applications from the AAM and can process within the Cumulus environment. Applications that are assessed within Cumulus will still need to be copy and pasted into GCMS once complete. Office-specific processing procedures should be followed and incorporated into the tool.

Links to Office Specific SOPs

- Office X

Commented [N1]: Hyperlink

1.2 Effective Date

The effective date of this Standard Operating Procedure is TBD, which coincides with the release of the Cumulus.

Version	Date	Authored/Revised By	Nature of Revisions
1.0	2021-07-02	Alexandra Ng-Yong, Noemie Daoust-Pinel, Pooja Patel	First draft
1.1			
These SOPs have been reviewed by (INSERT CONSULTATION LIST)			

2. Cumulus Accounts

2. Create Account
Please see the user Manual

3. Cumulus Overview

Commented [DZ]: Perhaps the more technical components should reside in the User Manual. SOPs could be more directional for processing the applications rather than explaining the views.

3.1 Summary list

Once you log into Cumulus, you are brought to a dashboard view. The table includes a brief synopsis of the applications as well as their current status as pulled from GCMS. **This tool only has viewing propriety, if you need to make a decision or change an assessment (eligibility, admissibility, final decision) on a file you still have to do it in GCMS. You cannot add any sub activities and there is no integrate search.**

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Applications are sorted in two categories in order to keep the workload organized: "To Do" and "Reviewed". Applications within the "To Do" tab include all applications that must be assessed. The "Reviewed" tab includes those that you have already assessed. Icons will remain static through the assessment steps. Once the application has been finalized within the tool, the icons may change when switched to Reviewed. All applications that have been imported will be removed once you log out of Cumulus.

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You can select applications by ticking the corresponding box and can remove them from the dashboard by clicking 'Delete'. This does not affect the application within GCMS.

3.1.1 How applications are assigned to officers.
- supervisor roles.

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3.1.2 How does an agent know what applications to work on first.

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Will add later.

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3.1.3 Selecting an Application (Application View)

Once you click on an application from the dashboard, you are brought to the Application View. Here, you can navigate between sections, view content, and make an assessment. Pages are divided into the steps of an assessment.

Within each step of the assessment, you can view the requirements for the clients, summary notes, and documents.

A. **Requirement section:** This view will contain all the detailed information for the respective client. These details come from GCMS and are classified by clients so that the user can easily assess and make a decision.
B. **Summary Section:** This view will display all the history of Notes/UCI notes on the file. This section intends to give the users a quick recap of the decisions and information that has been made/collected on that particular file.

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3.2 Steps of an Assessment

General Information: This section will contain an overview of the client's application, the SPR, PA and Dependent(s) - if any, summary and the representative information. Where from GCMS

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Figure 20: Requirements section under the Dependents View.

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4. Assessment Section Views

Below are screenshots of the assessment sections and detailed descriptions of what each section provides in order to make an assessment.

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4.3 Applicant Eligibility

This section will contain all the detailed information regarding the Applicant's Eligibility. You will be able to view the overall requirements to assess the applicant's eligibility, their documents/correspondence and a summary of notes. **If any assessment are made it needs to be reflect back into GCMS**

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Commented [D5R4]: Will also add line about the maximum amount of words.


Cumulus training
PR SCLP FCP Journey Lab
June 2022

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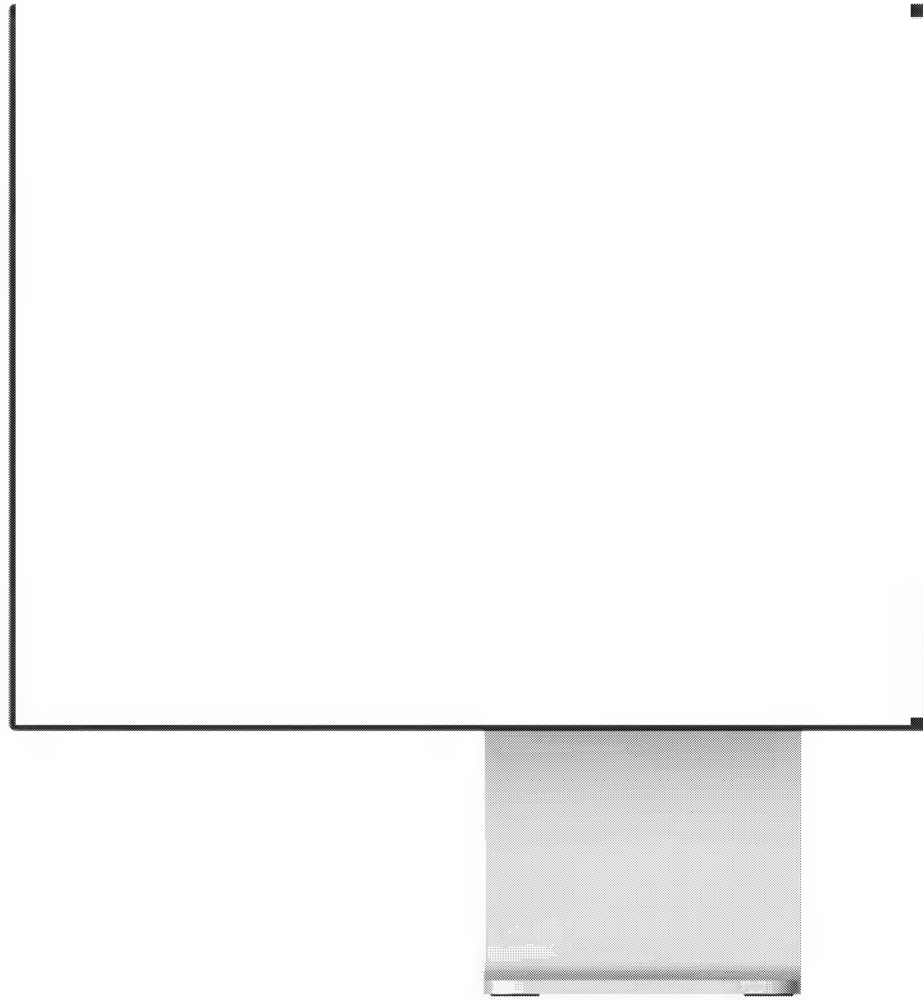
Journey Labs

Training Plan

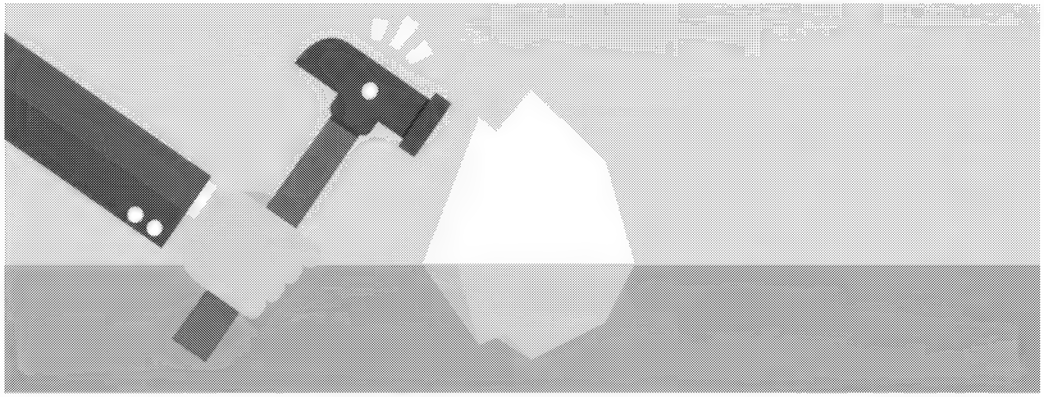
1. Introduction
2. Introducing Cumulus
3. Usability Activity
4. Cumulus demo
5. User Manual
6. Standard Operating Procedures
7. Shadowing activities



INTRODUCTION

Activity 1: Let's break the ice together

- What is your name?
- How long have you been processing PR?
- What will be the title of your autobiography?



INTRODUCTION

Activity 2:

What are your goals for this training?

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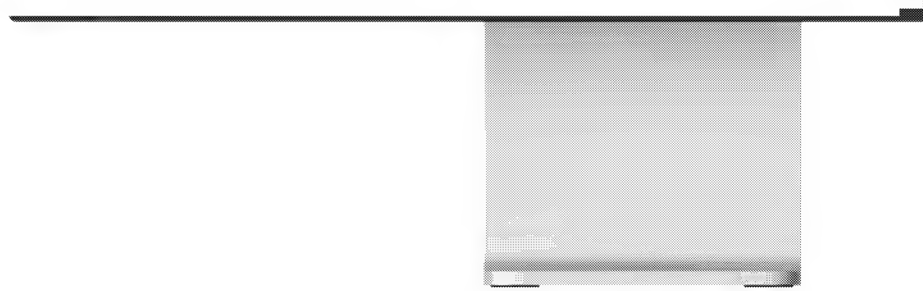
INTRODUCING CUMULUS

Cumulus

Cloud based processing tool for PR applications.

Cumulus is designed and developed in collaboration with IRCC subject matter experts including officers in each section of the Integrated network to provide an enhanced usability and user experience.

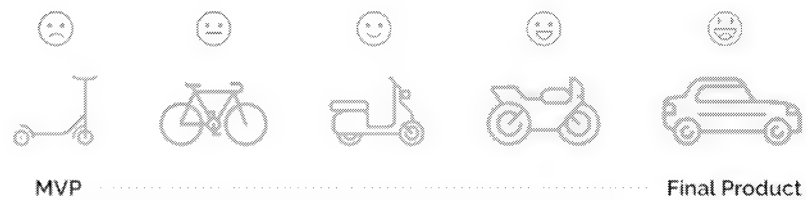


INTRODUCING CUMULUS

Minimum Viable Product (MVP) Definition

It is the smallest, leanest, scooter-like product we can deploy with value and learn from.

The first release of a product is never the final, it's not the Tesla off the lot. And for our MVP we focused on setting the technical foundations for a cloud based processing tool.



Journey Labs

CUMULUS

Current Capabilities

What it can do

- Displays client and application information
- Displays application and client notes
- Displays GCMS application and case history
- Displays e-documents online
- Makes notes, assessments and tracks actions

What it cannot do

- Does not display integrated search
- Does not save information after logging out
- Does not display previous applications
- Is not (yet) integrated with GCMS
  - *Integration scheduled to begin Summer 2022*

USABILITY ACTIVITY

Activity 4: Cumulus Usability Activity

- For this activity, you will need to log into Cumulus. You will be asked to review and process an application using the tool.
- This activity is meant to see how users respond to the design and determine if the tool is sufficiently intuitive – It is not meant to evaluate you. There is no pass or fail.
- We will review the User Manual and Standard Operating Procedures later in the training

CUMULUS

Demo

CUMULUS USER MANUAL

Let's review the User Manual

Cumulus User Manual:
https://gcdocs2.ci.gc.ca/otcs/cs.exe?func=ll&objaction=overview&objid=429774777

Journey Labs

CUMULUS SOPs

Let's review the standard operating procedures

Cumulus SOPs: https://gcdocs2.ci.gc.ca/otcs/cs.exe?func=ll&objaction=overview&objid=429307757

SHADOWING

Activity 4: Processing applications together

- For this activity, you will be processing applications leveraging Cumulus.

- A more experienced Cumulus user will shadow you and answer your questions related to the tool.

CUMULUS

Helpful resources:

Cumulus User Manual: https://gcdocs2.ci.gc.ca/otcs/cs.exe?func=ll&objaction=overview&objid=429774777

Cumulus SOP: https://gcdocs2.ci.gc.ca/otcs/cs.exe?func=ll&objaction=overview&objid=429307757

Dedicated inbox for Cumulus : IRCC.DJLCumulusLPN-DJLCumulusLPN.IRCC@cic.gc.ca

Immigration, Refugees and Citizenship Canada | Immigration, Réfugiés et Citoyenneté Canada

CUMULUS USER MANUAL

DLJ 3: FAMILY CLASS PR

Updated on: June 2022

Introduction

What is the purpose of a User Manual?

The purpose of this document is to provide Cumulus users with the required information and knowledge to operate the Cumulus processing tool.

What is Cumulus?

A cloud based case processing tool to simplify the application process, extract relevant information, and provide the ability to make assessments and take notes.

Who is Cumulus for?

IRCC agents, officers, and decision makers involved in Family Class PR applications.

What Does Cumulus Do Today?

1. Currently Cumulus is designed for FC-1, FCC, FCE applications.
2. Cumulus enables the user to assess an application for Sponsor Eligibility, Applicant Eligibility and Admissibilities.
3. Cumulus is not yet integrated with GCMS, it receives extracts every 24 hours from GCMS and pulls them into the Cumulus data model to be made available in our tool. We do not have CAIPS/FOSS history available yet as a result.
4. The user can enter their assessments, notes, and actions into Cumulus and then manually copy and paste them into GCMS.

Cumulus Key Highlights

• Enables users to process applications in a cloud based environment outside of GCMS.
• Allows officers, agents, and decision makers to view all applications assigned to them as well as pull in any Family Class Applications with an Open, On Hold or Re-opened status using the Add Applications functionality.
• Displays pertinent information related to the application.
• Ability to view eDocs and application notes seamlessly.
• Provides the ability to make assessments on the application and take notes.
• Designed with enhanced user experience and usability in mind.

Prerequisite to have Cumulus Account

1. Only users that have a current and valid GCMS account can use Cumulus.
2. The GCMS account is required, as well as an IRCC or GAC email address for validation.
3. Only users that have authorization to enter, update or create Eligibilities (Sponsorship or Applicant), Admissibility, and Notes or to set Application states or statuses can use Cumulus.
4. A complete Audit Trail is kept for the purpose of Program Integrity and to ensure compliance with relevant policies and legislation.

Table of Contents

Updated on: June 2022

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Signing In For New Users

The administrator gets a request to create a new user (please see the request forms under Operational Procedures). The administrator will email a temporary password to the user.

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Updated on: June 2022

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Updated on: June 2022

Figure 5: Application View

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Figure 6: The Navigation Bar

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Updated on: June 2022

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Updated on: June 2022

Copying and Pasting Assessments in GCMS

Refer to the Standard Operating Procedure for the standard procedures for entering data into GCMS. You will be able to refer back to Cumulus for all assessments you have entered. Cumulus will show all your assessments as long as you are signed into the tool.

Figure 11: Standard Operating Procedure

Cumulus Time Out

The Cumulus tool will be signed out automatically after 8 hours of inactivity for security reasons. Signing out of Cumulus means logging out of the network, if the laptop restarts or if there is inactivity for 8 hours.

> *If the user is signed out automatically, the assessments and the notes will be discarded as no information is saved in Cumulus. It is the agent's responsibility to transfer the notes and assessments to GCMS.*

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Updated on: June 2022

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Operational Procedures

Email IRCC.DJLCumulusLPN-DJLCumulusLPN.IRCC@cic.gc.ca with the following text in the Subject area

- *New Cumulus User*
    - You will receive an email with the New User template to fill in and send back
- *Cumulus Bug*
    - You will receive an email with the Bug Report template to fill in and send back
- *Delete Cumulus User*
    - You will receive an email with the Delete User template to send back.
- *Cumulus User Manual*
    - You will receive this manual as an attachment in the reply ☺

Email the following form to IRCC.ICRCCDJLPRFCLPNRPRF-ICRCCDJLPRFCLPNRPRF.IRCC@cic.gc.ca

- General Inquiry Template

Or send an email to that address with 'General Inquiry' in the Subject area to receive that template to send back in.

Glossary

Common terms that you might see as you're working in Cumulus.

To Do – To do tab is where all the application imported from the AAM will appear.

Reviewed – Reviewed tab is where you will see all the files you have reviewed.

Add Application - Adding applications to Cumulus.

Close - Brings the user back to the summary list.

Delete - Deletes files from summary list.

Summary List – The screen where you can see all the applications that you have imported into Cumulus.

Notes – A sticky notepad for taking notes as you assess the application.

Copy Button - Use this button to copy your notes or assessment.

Sponsor Eligibility Assessment – Dropdown where you can add in the latest assessment for the sponsor's eligibility after assessing the file.

Applicant Eligibility Assessment - Dropdown where you can add in the latest assessment for the applicant's eligibility after assessing the file.

Final Decision – Dropdown to mark the final assessment for the application once you are done assessing the file. Please note, you are still required to record this assessment into GCMS.

Review Button - Review button opens the review page that shows all the notes and assessments on one screen for your final review

Done Button - Done button will close the application you are working on and bring you back to the summary list

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CUMULUS USER MANUAL

DLJ 3: FAMILY CLASS PR

Rosenzweig.Jill

Updated on: October 6, 2021

Introduction

What is the purpose of a User Manual?
The purpose of this document is to provide Cumulus users with the required information and knowledge to operate the Cumulus processing tool.

What is Cumulus?
A cloud based case processing tool to simplify the application process, extract relevant information, and provide the ability to make assessments and take notes.

Who is Cumulus for?
IRCC agents, officers, and decision makers involved in Family Class PR applications.

What Does Cumulus Do Today?
1. Currently Cumulus is designed for FC-1, FCC, FCE applications.
2. Cumulus enables the user to assess an application for Sponsor Eligibility, Applicant Eligibility and Admissibilities.
3. Cumulus is not yet integrated with GCMS, it receives extracts every 24 hours from GCMS and pulls them into the Cumulus data model to be made available in our tool. We do not have CAIPS/FOSS history available yet as a result.
4. The user can enter their assessments, notes, and actions into Cumulus and then manually copy and paste them into GCMS.

Cumulus Key Highlights
- Enables users to process applications in a cloud based environment outside of GCMS.
- Allows officers, agents, and decision makers to view all applications assigned to them as well as pull in any Family Class Applications with an Open, On Hold or Re-opened status using the Add Applications functionality.
- Displays pertinent information related to the application.
- Ability to view eDocs and application notes seamlessly.
- Provides the ability to make assessments on the application and take notes.
- Designed with enhanced user experience and usability in mind.

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1. Only users that have a current and valid GCMS account can use Cumulus.
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4. A complete Audit Trail is kept for the purpose of Program Integrity and to ensure compliance with relevant policies and legislation.

Table of Contents

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Copying and Pasting Assessments in GCMS

Refer to the Standard Operating Procedure for the standard procedures for entering data into GCMS. You will be able to refer back to Cumulus for all assessments you have entered. Cumulus will show all your assessments as long as you are signed into the tool.

Figure 10: Standard Operating Procedure

Cumulus Time Out

The Cumulus tool will be signed out automatically after 8 hours of inactivity for security reasons. Signing out of Cumulus means logging out of the network, if the laptop restarts or if there is inactivity for 8 hours.

> *If the user is signed out automatically, the assessments and the notes will be discarded as no information is saved in Cumulus. It is the agent's responsibility to transfer the notes and assessments to GCMS.*

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Operational Procedures

New User Request Form, please fill it out and email it to IRCC.DJLCumulusLPN-DJLCumulusLPN.IRCC@cic.gc.ca

Bug Report Template, please fill it out and email it to IRCC.DJLCumulusLPN-DJLCumulusLPN.IRCC@cic.gc.ca

Glossary

Common terms that you might see as you're working in Cumulus.

To Do – To do tab is where all the application imported from the AAM will appear.

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Summary List – The screen where you can see all the applications that you have imported into Cumulus.

Notes – A sticky notepad for taking notes as you assess the application.

Copy Button - Use this button to copy your notes or assessment.

Sponsor Eligibility Assessment – Dropdown where you can add in the latest assessment for the sponsor's eligibility after assessing the file.

Applicant Eligibility Assessment - Dropdown where you can add in the latest assessment for the applicant's eligibility after assessing the file.

Final Decision – Dropdown to mark the final assessment for the application once you are done assessing the file. Please note, you are still required to record this assessment into GCMS.

Review Button - Review button opens the review page that shows all the notes and assessments on one screen for your final review

Done Button - Done button will close the application you are working on and bring you back to the summary list

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CUMULUS USER MANUAL V0.2

DLJ 3: FAMILY CLASS PR

Update on: August 24, 2021

TABLE OF CONTENTS

Getting Started

WHAT IS CUMULUS?

The Cumulus case processing application is an agent facing application deployed on cloud environment and accessible via browser. This application is an enhanced viewer and notes taking application that provides agents with the consolidated view of application data and supporting documents.

HOW TO GET STARTED FOR NEW USERS?

Cumulus tool is by invitation only. The Administrator will get a request to create a new user (with all the necessary information).

Then, Cumulus administrator(s) will create a new user account with a temporary password. This will be emailed to the new user.

The user will be getting an automated temporary password from the Administrator. The user will need open the tool and log in using their email id ending with 'cic.gc.ca' or 'international.gc.ca' and enter the temp password.

The user will then be redirected to a reset password screen where they can reset their password with a password of their choosing. This flow is made to make sure the users are validated before they start using the tool and to add then to the user pool of the Cumulus tool in the backend.

After the user enters the code and the new password, they will be redirected again to the sign in page.

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WHAT ARE THE ASSESSMENT SECTION VIEWS?

1.3 Navigation Bar

The navigation bar is divided into 5 sections.

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This panel will always contains a notepad for more effective note taking and referencing. The notes section is continuous, meaning you will see the notes you have taken as you navigate from view to view. You will also be able to view all the notes you have taken while assessing the application, when you click on the 'Review' button. The assessment panel will also have assessment dropdown depending on the section of the application you are in through the navigation bar.

Please note: Currently, Cumulus allows to make decisions for Sponsor Eligibility and Primary Applicant Eligibility only.

WHAT ARE THE NOTABLE DATES?

Date: Cumulus Tool tentative release in 4 to 6 weeks.

WHAT ARE THE PREREQUISITES TO USE THE TOOL?

Cumulus is an internet/browser based tool. You can user any web browser to access Cumulus like Chrome, Edge, Firefox or Safari.

WHO CAN USE THIS TOOL?

Currently, only agent will be able to access and assess the applications.

WHAT ARE THE ACTIONS IN CUMULUS?

Actions	What Happens
Add application	Adds applications from the AAM to Cumulus
Delete	Deletes files from Dashboard
Close	Brings user back to the dashboard
Copy Button	Use this button to copy your notes or decision
Review Button	Review button opens the review page that shows all the notes and decisions on one screen for your final review
Done Button	Done button will close the application you are working on

GLOSSARY

Common terms that you might see as you're working in Cumulus.

ToDo – To do tab is where all the application imported from the AAM will appear.

Reviewed – Reviewed tab is where you will see all the files you have reviewed.

Dashboard – The view screen where you can see all the file that you have imported into the Cumulus tool.

Notes – A sticky notepad for taking notes as you assess the application.

Sponsor Eligibility Assessment – Dropdown where you can add in the latest decision for the sponsor's eligibility after assessing the file.

Applicant Eligibility Assessment - Dropdown where you can add in the latest decision for the applicant's eligibility after assessing the file.

Final Decision – Dropdown to mark the FINDEC decision for the application once you are done assessing the file.

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HOW DO I ADD APPLICATIONS TO THE DASHBOARD?

WHAT DO I NEED TO KNOW TO START REVIEWING AN APPLICATION?

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HOW DO I DO A FINAL REVIEW?

This is what the Reviewed page on the Anchor View will look once you have reviewed an application.

Please note: The notes and the assessments that you have entered in this tool will only remain for that current session. Once you sign out, the notes and assessments are erased from Cumulus.

WHERE TO COPY/PASTE DECISIONS IN GCMS?

Refer to SOP for the standard procedures for entering data into GCMS. You will be able to refer back to Cumulus for all assessments you have entered. Cumulus will show all your decisions as long as you are signed into the tool.

Support and Troubleshooting

WHERE DO I FIND ADMINISTRATOR INFO?

For any information or queries please email us at: cumulus[email]@cic.gc.ca

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HOW TO SIGN IN?

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Scenario 1 - For users who have validated their account via the temp password

Scenario 2: Administrator force password.

In the event the administrator feels there is a concern with an account or something is wrong and the password needs to be reset. The Administrator can force a password reset. When the administrator resets your password, you will follow the same directions as when you created your password for the first time.

After you enter the code and the new password, you will be redirected again to the sign in page.

HOW DO TROUBLESHOOT ADD APPLICATION ERRORS?

Scenario 1: When the user clicks import and the server has a connection error.

Here are all the possible errors you might see if the server has a connection problem or is down:

- Out system is down. Try again later.
- Bad Request
- Not Authorized
- Access Denied
- Not Found
- Internal Server Error
- Unknown Server Error

Scenario 2: When a user inputs an invalid application number. The most common error case will be a copy error from mod 1. Here are all the possible errors you might see:

- Application number format invalid
- Please enter a valid application number
- Some application numbers are invalid

Scenario 3: When a user tries to input an application that is already imported.

When you add in the applications that are already imported then the system will not import them again and show an message "[Existing application] out of [Pasted application] complete.

CHINOOK1.5

TRV Journey Lab

Chinook 1.5 & GCMS Chinook Tab
USER MANUAL

Commented [D1]: All Screenshots should be redacted. Release of screenshots would give an indication of Architecture that could create vulnerabilities

Table of Contents

Chinook 1.5 at a Glance

Chinook 1.5 is the newest generation of the Chinook suite of tools developed at Immigration, Refugees and Citizenship Canada (IRCC) to support the processing of Temporary Resident applications. Built to replace earlier Excel-based versions of the tool, Chinook 1.5 is based on a customized Azure cloud-enabled version of the modern Microsoft Dynamics 365 platform, with technical development undertaken by a team within the IRCC Digital Journey Labs in close collaboration with IRCC Operations Sector partners.

The User Interface (UI) of Chinook 1.5 has a different look and feel when compared to earlier versions. Despite this, the tools fulfill similar needs and Chinook 1.5 development remains faithful to the officer-centric principles of earlier Chinook products; multiple files, data points and fields can be viewed on a single screen and the number of clicks required to complete actions have been minimized. Further, as Chinook 1.5 enters widespread operational use, additional enhancements to functionality and usability will be made based on feedback collected from those using the tool. Collection of this feedback will be done through a variety of means and will give all users a voice in the continuous and ongoing development of the tool; your feedback will directly inform design and delivery of future improvements.

One significant change between Chinook 1.5 and legacy versions of Chinook tools is the way a user accesses application information. Unlike older Excel versions of the Chinook tool, Chinook 1.5 data is updated centrally rather than by mission or region, allowing for more flexibility related to work sharing and monitoring and management of inventory across offices and processing networks. It is important to note however that, like earlier version of the Chinook tools, Chinook 1.5 data remains out of sync with GCMS production at this time, as there is not yet a direct connection to the Global Case Management System (GCMS) or Enterprise Data Warehouse (EDW). Resolving this shortcoming is a key priority for the development team responsible for the tool, and the team and its partners are aiming to have a connection with EDW established in Spring 2022.

To date, the Journey Lab responsible for delivery of Chinook 1.5 has completed work to replace Chinook Modules 3 and Chinook 3+. This will be followed up in the near future with integration of functionality associated with Chinook Mod 1 and Chinook Mod 5 into the cloud.

0. Getting Started

0.1 LOGIN

- Chinook can be accessed via **Chinook will only work in Chrome** – do not use Internet Explorer or Microsoft Edge: https://ircc-chinook.crm3.dynamics.com/
- Login using your Microsoft Teams credentials when prompted.
- Select and enter one of the Chinook 1.5 modules.
  - Depending on permissions, you may be able to see one or more options.
  - You can return to the home screen to navigate between modules by selecting the Home button at the top of the menu on the left
  - You must agree to the Disclaimer before proceeding.

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0.2 PERSONALIZATION SETTINGS

- Personalization setting can be accessed via the Settings icon at the top right of the screen. These include **language settings (example below)** and **date format**. These can be changed at any time.

  Note: In the Language Settings section, only the *User Interface Language* and *Help Language* can be updated, and default date format has been set to match GCMS.

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0.3 CHINOOK 1.5: UNDERSTANDING VIEWS AND FORMS

To understand this document it is important for users for understand the differences between the two user display interface used within Chinook 1.5. These are used for different purposes depending on the context of actions required and the information displayed. These are known as Views and Forms.

VIEWS

Views represent the user interface of Chinook 1.5 where users of the tool can triage and assign workload. These are presented in a column and row format similar to what one would find in Microsoft Excel or other spreadsheet style layout. In general views give a less detailed overview of data than forms.

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including the *Application Details Roll-Up* and *Travel Doc Details* forms.

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1. Chinook 1.5 – Officer Tool

1.1 OFFICER TOOL OVERVIEW

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The Chinook 1.5 Officer Tool allows IRCC decision makers to view information collected from different areas of GCMS then organizes this information in a way that reduces the number of clicks an officer would otherwise have to make. The tool then supports the ability of decisions makers to take actions and decisions on temporary resident applications, including streamlining steps and processes that normally require extra time to complete. Areas that the Chinook 1.5 Officer Tool facilitates the work of IRCC decision makers include:

- Supporting Final Decision Administrative tasks: Decision-makers can now complete tasks in fewer steps than before, including:
  - Entry of Final Decisions, including refusal grounds
  - Pasting notes from Chinook into GCMS Application Notes.
  - Generation and sending of passport request/refusal letters
  - Generating counterfoils and permit documents
  - Setting counterfoil print queue
  - Modifying SP/WP Permit Details including Conditions, Remarks, Exemption Codes and NOCs.

- See Increased Biometrics Details in Chinook: Chinook displays a roll-up of the detailed biometrics information typically found in the GCMS "Encounters" tab.

- Complete Info-Sharing Administrative tasks: Decision-makers can now indicate their Info-Sharing decision in Chinook, and the entry will populate into GCMS.

- Complete Actions without Finalizing an Application: Some Biometrics, Medical, and Eligibility actions can be taken in Chinook and will be updated in GCMS through a datapack transfer process.

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1.2 FINDING AND ASSIGNING WORK

1.2.1 OVERVIEW OF OFFICER TOOL VIEWS

IRCC Decision makers can access and assign work to themselves (and others) within the Chinook 1.5 Officer Tool, and unassigned these as appropriate, returning them to the system queue for others to action. A number of pre-defined views have been created within the Chinook 1.5 Officer tool to assist decision makers in doing this triage and management of workload. These views are named in a way that makes it easy to determine their purpose.

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When users first log into the Officer tool and navigate to the views screen, the default view will be *My Applications Summary*; if users already have items assigned to them in the Officer Tool, a list of these will appear here. This default view can be changed by selecting a view then selecting "Set current view as my default". Users can also create their own views if required. A few of the most commonly used pre-defined views in the Officer Tool include:

VIEW NAME	VIEW DESCRIPTION
My Applications Summary	Contains all active applications assigned to the user. This allows individuals to see what work is assigned to them and to triage and action this work accordingly.
Applications Summary	Contains all active applications uploaded to Chinook 1.5. Typically users will select records from this view and assign to themselves before proceeding with decision making related actions.
Biometric Action View	Needs to be filled in.
Inactive Applications	Contains a list of all applications where the value in the "Sent to GCMS" column has been set to Yes. This view provides a record of what has been completed in Chinook 1.5, allowing for reporting and QA as required.
Inactive Applications Report	Needs to be filled in.
My Groups	Needs to be filled in. This was listed in original manual but I don't see this view listed in the Officer Tool. Is it still needed?
Other Commonly Used View?	Needs to be filled in.

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1.2.2 USING SEARCH TO IDENTIFY APPLICATIONS

Users can complete a search for specific application numbers within a view. This is useful when action on a specific application is required or (for example) when a user has populated a list of applications that requires decision making related actions using the Application and Activity Management tool (AAM) or Chinook Mod 1. Importantly, file information will only populate if a record associated with the application in question can be accessed from that view. Therefore the two most useful views for search applications are the *Applications Summary* view (for active applications) or the *Inactive Applications* view for applications where decision information has already been exported to GCMS.

These are two ways a user can search for application numbers within Chinook 1.5 .

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SEARCH FOR MULTIPLE APPLICATIONS

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SEARCH FOR SINGLE APPLICATIONS

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1.2.3 ASSIGNING APPLICATIONS

When is come to managing the assignment of applications, users can:

- Assign applications to themselves,
- Be assigned applications by other Users
- Assign applications to other Users.
- Un-assign applications

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Once a user has applications assigned to them, they can view these by navigating to the *My Applications Summary* view from the menu at the Views dropdown menu.

1.3 VIEWING APPLICATION DETAILS

1.3.1 USING APPLICATION HYPERLINK

Once a view has been populated with the information from one or more applications, a user can navigate to the details of that application by clicking on an application number hyperlink. This will bring the user to an Application *Details>Information>Roll-up* form. From here, a user can navigate to the *Application Details>Information>Travel Doc Details* form.

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1.3.2 USING RECORD SET FUNCTIONALITY

Once within the *Application Details* form (either *Roll-up* or *Travel Doc Details*), a user can move between applications and records listed in the associated view list by enabling the *Record Set* navigation pane. For most users this functionality is most useful when navigating between applications assigned to them within the *My Applications Summary* view and preparing decisions on a case by case basis rather than approving or refusing multiple applications simultaneously.

To enable the *Record Set* navigation pane from within the *Application Details* form:

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- While moving from application to application within the burger menu, a user can choose to Approve, Refuse, Withdraw or perform an Other action (ex. Biometrics) for one application at a time.

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1.4 PREPARING FINAL APPROVALS, REFUSALS AND WITHDRAWALS

1.4.1 IDENTIFYING AND SELECTING APPLICATIONS FOR ACTIONS

Final Decisions and some other actions can be taken using buttons located at the top of the menu bar when one of the following criteria is met.

1. User has navigated to the *Application Details* form of a single application, either by:
   a) Clicking on the application number hyperlink from a view or;
   b) Selecting a record when using the record set list (see right).

2. One or more application is selected and the user is within the *My Applications Summary* view (see below).

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1.4.2 PREPARING FINAL DECISIONS: APPROVALS

Note: While the steps outlined in this section are specifically for Approvals, the same steps and guidance also generally apply for Refusals (see section XXXXXX) and Withdrawals (see section XXXXXX)

1. Determine and select if you are planning to prepare a decision on one or more application at a time (see above). Note that the steps for preparing one application at a time include instances where a user navigates between applications using the *Record Set* menu (see section 1.3.2).

2.

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3. Review the details of the decision within the *Approved>General* form and update as necessary. This consists of multiple sections and may require a bit of scrolling. Further, depending on the type of application(s) being reviewed, there may be minor differences in layout and content of this form. Instructions for fields within this view include:

⚠ Important Reminder: When preparing multiple decisions simultaneously, All information entered within the action form must match for all applications, including values for each of the fields listed below.

A. Counterfoil Print Queue

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B. Number of Entries

Select the number of entries associated to the document being issued.

C. Counterfoil Validity Date

For Study Permit and Work Permit applications the

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For Temporary Resident Visa applications setting of Counterfoil Validity Date works differently. Because determining this date is easier for most TRV applications, there is a slider that allows users to either:

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F. Assigned To and Due Date

Use the *Assigned To* and *Due Date* fields to assign the application to an individual (or GCMS placeholder code) in GCMS.

- Enter the GCMS ID they wish to assign the application to.
- Enter a due date

Once a datapack is exported to GCMS, the GCMS ID and due date will populate in the *Application Assignment* section in GCMS, as will an Assigned By value.

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G. Exit By Date

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Either manually enter a date by double clicking in the *Exit by* field or choose a date by clicking the calendar icon on the right hand side of the field and picking in the appropriate date.

H. Permit Details (SP, WP, SP-EXT and WP-EXT only)

There are number of fields and dates to be updated that are specific to the processing of permit applications. These include:

Permit Validity Date

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Permit Conditions

These are listed on the bottom of the screen. Select all relevant Conditions and Set Factors to Yes. NOTE: SOME conditions default to Yes based on specific criteria related the DLI and Level of Study.

Remark Option Note: A decision maker can enter remarks notes for the application if required.

Exemption Code: Enter if applicable.

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I. Notes

Application Notes: Enter notes as you would enter them in GCMS. Anything entered into this section will be added to the Notes section of GCMS.

Working notes: act similar to a notepad, where users can enter information useful for organizing work. This information is not sent to GCMS during the final stages of processing.

4. Once the details of the application(s) have been reviewed and it has been determined that all requirements are met and relevant information has been entered in the *Approved* action form, the next step is to do one of the following:

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⚠ Important Reminder: When preparing multiple decisions simultaneously, All information entered within the *Approved* action form must match for all applications, including dates, print queue and notes. This is the information that will be exported and populated during the decision recording phase of the decision making process within GCMS.

5. Whether a single decision or multiple decisions have been prepared and saved, the information entered into the *Approved* action form will now appear for those applications within the *My Applications Summary* view. A user can now either choose to export decisions already prepared or can complete steps for the remainder of applications list within their *My Applications Summary* view. Steps for exporting prepared decisions and recording these in GCMS can be found in section XXXXXX of this document.

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1.4.3 PREPARING FINAL DECISIONS: REFUSALS

Note: While the steps outlined in this section are specifically for Refusals, the same steps and guidance also generally apply for Approvals (see section XXXXXX) and Withdrawals (see section XXXXXX). **Users will be unable to save their refusal actions should they not follow these specific instructions.** If this occurs an advisory box will detail why the action could not be saved – either because additional details were not added to the note or an additional ground was not selected.

1. Determine and select if you are planning to prepare a decision on one or more application at a time (see 1.4.1). Note that the steps for preparing one application at a time include instances where a user navigates between applications using the *Record Set* menu (see section 1.3.2).

⚠ Important Reminder: When preparing multiple decisions simultaneously, All information entered within the *Refused* action form must match for all applications, including refusal grounds and note details. Therefore multiple refusals should only be prepared together when the applications are related, and all refusal grounds are the same (Family groups,. attending same event etc).

2.

3. Review the details of the decision within the *Refused>General* form and update as necessary. This consists of multiple sections and may require a bit of scrolling. Further, depending on the type of application(s) being reviewed, there may be minor differences in layout and content of this form. Items that need to be reviewed and populated for refusals include:

   A. Generate Refusal Letter

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C. Refusal Grounds and Refusal Notes

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4. Once the refusal details of the application(s) have been entered in the *Refused* action form, the next step is to do one of the following:

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⚠ Important Reminder: When preparing multiple decisions simultaneously, All information entered within the Refused action form must match for all applications, including dates, print queue and notes. Therefore multiple refusals should only be prepared together when the applications are related, and all refusal grounds are the same (Family groups,. attending same event etc).

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5. Whether a single decision or multiple decisions have been prepared and saved, the information entered into the *Refused* action form will now appear for those applications within the *My Applications Summary* view. A user can now either choose to export decisions already prepared or can complete steps for the remainder of applications list within their *My Applications Summary* view. Steps for exporting prepared decisions and recording these in GCMS can be found in section XXXXXX of this document.

1.4.4 PREPARING: WITHDRAWALS

Note: While the steps outlined in this section are specifically for Withdrawals, the same steps and guidance also generally apply for Approvals (see section XXXXXX) and Refusals (see section XXXXXX)

1. Determine and select if a withdrawal is being prepared for one or more application at a time (see 1.4.1). Importantly, because little to no decision information needs to be entered for most withdrawal applications, it is much easier to prepare withdrawals in bulk.

2.

3.

For single applications: When a decision is being prepared for a single application, the user simply has to add relevant application notes then select the *Save and Close* button in the ribbon menu at the top of the Screen.

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1.5 PREPARING OTHER ACTION

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1.5.1 Request Medicals or

After selecting one or more applications where a request for medicals required and proceeding to complete an Other Action, a user needs to:

1. Select Yes to the *Request Meds* option and/or one or more of the options.
2. Select *Save* if more actions are required, or select *Save and Close* to return to the *My Application Summary view.*

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1.5.2 Request Authorization for a Minor to Travel, CAQ or Other Documents

After selecting one or more applications where a request for Authorization for a Minor to Travel, a Quebec Acceptance Certificate (CAQ) or Other document is required, a user needs to:

a) Select Yes to one or more of the document types as applicable.
b) For each item selected, Navigate to the add additional details by clicking the arrow the right of the associated field
c) Request Authorization for Minor to Travel.
d)
e)

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a. After selecting or viewing a file, click the Other button. The Other pop-up window will appear.
b. Change Eligibility to **Passed.** (The request cannot be processed in GCMS unless Eligibility is set to Passed).
c. Select (as applicable). Once actioned in the *datapack* and processed in GCMS, the relevant Activity (Security, HIRV or Organized Crime) status will be set to *Submit-delayed*.

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Add to list of known bugs

KNOWN BUG: The tickboxes under Admissibility Requests on the main application page in GCMS will not be checked when requesting a or Medical in Chinook.

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KNOWN BUG: Application notes entered on the Other Action window are not currently being transferred into GCMS.

NOTE: *Request Authorization for Minor to Travel, Request CAQ and Request Other Document(s)* actions are not automated in GCMS. Applications with these actions can be grouped in Chinook, exported in Excel and processed in bulk in GCMS. This workflow is similar to the creation of Action Lists in the Excel versions of Chinook.

To export your action list:

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Biometrics Actions

Biometrics actions can be taken in Chinook with or without Approving or Refusing an application.

Biometrics information can be viewed by hovering over the **Biometrics Roll-Up** column in the **My Biometrics** or **My Applications Summary View** or on the **Roll-Up** tab after selecting an application number.

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There is more than one way to take a Biometrics Action in Chinook:

a. From any View, selct an application with the check box. The BioAction button will appear along the top of the page.

BioAction

b. Press the BioAction button. The Biometrics Action window will open. It will include the check box options for the user's Biometrics Action, the Biometric Roll-Up and the current Status Reason for the Biometrics Action (Not reviewed, Reviewed or Review Required).

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- For applications where the Biometric – FCC Detail Activity at status Ready to be Assessed, the appropriate check boxes will be activated.
- The checkboxes will only be activated if the Biometrics FCC Detail for the country has a status of "Ready to be Assessed" EXCEPT when the Encounters associated with the applicant are of the following Type:
- For applications where the *Biometric – FCC Detail Activity for* *Complete Assessed* check box has been selected, the Status Reason will display *Reviewed*.
- If further review of the biometrics is required outside of Chinook, click the Review Required checkbox. The Status Reason will change to *Review required*.

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1. TAKING ACTIONS ON MULTIPLE APPLICATIONS

Chinook 1.5 includes functionality to take actions on applications in bulk.

NOTE: you must intend all of the underlying actions (Counterfoil Expiry Date, Print Queue, Conditions, Refusal Grounds etc.) to be identical.

You have to select all the files from your My Application Summary View.

All the files selected must be in the same **Application Category**.

1) Assign the files to yourself if not already assigned. (See instructions above).
2) Select all of the applications for which you will be taking a decision in bulk using the checkmark to the left of the application number.
3) Click the **Approver/Refused,Withdrawn/Other** on the top menu.
4) Enter all required details of your decision.
5) Click the **Apply to All** button on the top menu. The Action you chose and all subsequent details will be applied to all the selected applications.
6) Click **Save and Close** button on the top menu.

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Also release of personal information (application numbers)

4. CHANGING OR DELETING AN ACTION

To **change** an Action taken on an application prior to exporting to GCMS, select an application using the checkbox and click the action button for the action you wish to take. The pop-up window for selected action will now appear.

For example: You wish to change the action on an application that has been Approved in Chinook (but not sent to GCMS) to Refused.

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1) Select the application using a checkbox.
2) Click the Refuse button.

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3) The Refusal pop-up window will appear. Enter the relevant information for your decision, then Save and Close.

To **delete** or clear an action:

1) Select an application using a checkbox.
2) Click the Clear Action button from the ribbon bar at the top of the screen

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4. GROUP VIEW AND TAKING GROUP ACTIONS

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2. Exporting to GCMS

Decisions and Actions must be exported to GCMS via the **Applications Ready For GCMS** view and **Send to GCMS** button. Once clicked, the button will copy instructions for GCMS onto your clipboard that can then be pasted directly into the GCMS Chinook Tab to perform final decision administrative actions that typically would have been done manually. These actions are the following **(See Annex B & C for full details of actions completed in GCMS, including logic**):

- Final Decision entry
- Biometrics FCC Detail Assessments
- Pasting decision notes from Chinook into Notes Tab
- Entry of refusal grounds
- Generation and sending of passport request/refusal letters
- Generating counterfoils and Permit documents
- Setting Counterfoil Print Queue
- Setting Counterfoil Validity Date
- Setting Permit Validity Date (SP/WP/SP-EXT/WP-EXT only)
- Setting Conditions & Remarks (SP/WP/SP-EXT/WP-EXT only)
- Setting Exit by Date
- Updating Number of Entries
- Updating NOC Code and Exemption Code
- Assigning Application with the Due date

In addition, Chinook 1.5 includes the ability to complete the following Actions without entering a Final Decision:

- Request a
- Issue Meds
- Change Eligibility
- Complete Biometrics

  NOTE: All actions that are automated in GCMS, will be tagged in GCMS against the user's GCMS ID.

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1) All applications that have had an Action completed in Chinook (Approved; Refused; Withdrawn; Other; Biometrics) will appear in the **Applications Ready for GCMS** view.

2) Select the applications intended to be exported to GCMS using the checkbox beside the file number.

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And personal infromation

3) Click the Send to GCMS button on the top menu.

4) The following window containing Datapack information will pop up. This is the underlying code that will allow the actions taken in Chinook to be automated in GCMS

   Click Copy to clipboard.

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5) Navigate directly to the GCMS Chinook Tab to paste the information into GCMS. (see Chinook Tab instructions below).

6) 7. In Chinook, applications exported to GCMS become Inactive and can be viewed in the Inactive Applications view.

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5. Sorting and Filtering

Columns can be sorted and filtered by clicking on the small arrow beside the column header.

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6. Creating Views

In addition to the Views available in Chinook by default, users can create and save customized views based on filtered columns. For example, a view can be created that filters by Category, Citizenship and Purpose of Visit and saved under a name of the user's choosing. This View will be saved in the View dropdown list.

1. Create a View by filtering columns by the criteria of your choice.

2. Click the small arrow beside the **Create view** button on the top of the screen. Click on **Save filters as new view.**

3. The new View will appear in the View dropdown menu under My Views

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4. To **delete** a view, click the **Create view** button. A new window will open.

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6. Select the View(s) to be deleted by using the check boxes.

7. Click the Trash icon to delete.

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GCMS Chinook Tab

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Commented [D74]: All Screenshots should be redacted. Release of screenshots would give an indication of Architecture that could create vulnerabilities

Commented [K75]: Added the sub activity view would be useful to officer to review their decision

Quick basics about the Chinook Tab:

- Decisions entered in the Chinook Tab, will normally not overwrite existing decisions in GCMS (including Eligibility and Findecs)
- Any application processed in the Chinook tab will always be tagged to the Chinook Session ID – so it can be queried at a future time.
- All Chinook Tab data will be available via Answers Queries Errors that typically prevent applications from being finalized (i.e. Cost Recovery fee outstanding, Biometrics not assessed, open Criminality/Security assessments or Verifications etc) will continue to be returned in the Chinook Tab.

There are three sections to the new Chinook Tab:

1) Chinook Upload Session
    - To Create new Chinook Upload Session (much like creating a group)
2) Paste Chinook Decision Data

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- Paste data here after clicking "Export to GCMS" button in Chinook

3) Uploaded Chinook Apps List

Review uploaded Chinook Application information

1) Before pasting information from the Export to GCMS Chinook button, a new Chinook Session must be created.
2) In the Chinook Upload Session window, click *New* button

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3) Session ID: A new Chinook Session ID # will appear in the ID column
4) Name: The Session name can be edited in the name column. The name will default to the Session ID if not modified by the user
5) In the *Paste Chinook Decision Data* section of the tab, paste (CTRL+V) your data from the *Export to GCMS* button in Chinook.

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NOTE: A "$" sign will appear at the end of the pasted Chinook information. This indicates the end of the information. Do not hit enter, or enter any other characters after this $ - it will cause an error.

6) Click the *Upload Chinook Data* button to review your application information.

NOTE: This will not process the decisions, it will pull the Chinook decision information into the Uploaded Chinook Data list for review.

7) The application information entered in Chinook will appear in the Uploaded Chinook Data window:

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8) The following information can be reviewed in the relevant columns:

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Commented [K81]: GCMS column don't default in the Upload chinook apps list – Although you can add them though through the Menu

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Commented [D83]: All Screenshots should be redacted. Release of screenshots would give an indication of Architecture that could create vulnerabilities

Commented [K84]: Added this screen shot where officers can review more info

9)

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NOTE: Depending on the number of applications being processed, the delay may be several minutes. The buffer wheel will only appear for 90seconds and then will disappear. This does not mean that the processing has crashed. Status will change to Complete or Complete- Error once processing is done.

SUGGESTIONS:

- Do not process more than 25 applications at a time.
- Continue review of remaining applications in Chinook while you wait for the Chinook Tab to finish processing.
- The Chinook Upload Session status will indicate the processing status of the group of applications in that session.

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- The Chinook Upload Session window also provides a summary of the # Apps, # Approved, # Withdrawn, # Refused, # Errors as well as the elapsed time for each complete session.
- As mentioned above, errors typically returned to a user to indicate that the application cannot be finalized, will still appear in the Chinook Tab under Application Error Status.
- There are several new errors listed below that are specific to the Chinook Tab:

Commented [D88]: All Screenshots should be redacted. Release of screenshots would give an indication of Architecture that could create vulnerabilities

Commented [K89]: I think this error message has to do with users role and permission in GCMS

Commented [K90]: I think this error message has to do with different application from different environment.

Commented [K91]: I think this error may have to do with Biometrics Action

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11) Fix the error, if possible and use the thread bar to return to the Chinook Session Tab.

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12) Click the Process Chinook Decisions button, and all applications that are not at *Status= Complete* will be re-processed.

13) To delete an application from a Session, highlight the application(s) and click *Menu>Delete Record*.

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Troubleshooting

The Chinook+ and Chinook Tab are new and there may be bugs that have not been identified. There are a few known issues that are identified below to assist with troubleshooting:

Issue	Workaround
The buffer wheel disappears and it looks like the Chinook session has crashed. OR Chrome gives me this Page Unresponsive message:	In GCMS, the buffer wheel automatically disappears after 60-90second. Unfortunately, this isn't something we could easily fix. So **trust it and let it run** – the Session Status will change to Complete – No Error or Complete – Error once it's done. Do not click the Process button again as this will actually make it crash.
When I paste my information from Chinook into the Chinook Raw Data window, I see a $ and then some other symbols: Ex: V1|Chinook Application Number|V1 V1|Chinook Eligibility Assessment|33 V1|Chinook Final Decision|01 V1|Chinook Decision By| V1|Chinook Generate Documents|Y $ >p	To avoid errors in the Chinook Tab, ensure that there are no extra characters or spaces after you paste in the Chinook Data window: Delete all extra characters and spaces after the $.

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Phase 1: Officer Tool Pre-Roll-Out

Time Period		Officer Tool	
April to May	1.1	Test in STG within the Journey Lab	1.1
	1.2	Test in STG with IN, CPC-O & CPC-E testers	1.2
	1.3	Identify, engage and train Officer Tool Champions	1.3
	1.4	Validate Chinook accessibility on GAC Network	
	1.5	Engage Change Management Consultants	
	1.6	Secure Microsoft Licenses	
	1.7	Develop Officer Tool User Manual & Training Videos	

Phase 2: Officer Tool Roll-Out and

Time Period		Officer Tool	
May to July	2.1	Test in PROD in Journey Lab	2.1
	2.2	Test in PROD in RROC, CPC-O & 3-5 IN Offices	2.2
	2.3	Fix Bugs as identified	2.3
	2.4	Improve Officer Tool UI/UX based on user Feedback	2.4
	2.5	Widen Officer Tool Roll-Out to Additional Users/Offices	2.5

Phase 3: AAM Roll-Out and Risk F

Time Period		Officer Tool	
August to November	3.1	Continue to improve UI/UX based on user feedback	3.1
	3.2	Officer Tool and AAM functionality is merged	3.2
	3.3	Files accessed via AAM-triaged bins	3.3
			3.4
			3.5
			3.6

			3.7

Phase 4: Acceleration of Automati

Time Period		Chinook Officer
November onwards	4.1	Expand automation of administrative tasks
	4.2	Applications triaged up-front based on business rules and risk indicators
	4.3	Activity-based processing expanded
	4.4	Change Management communications plan developed to address Activit
	4.5	Explore AI functionality in compliance with Government of Canada guidel

Key Risks and Mitigatio

Key Risks
LES not granted access to Chinook by IT Security
Pushback against use of new tool
Concerns automation could impact job security
AI development is slowed by Legal and reputational concerns
Ground to Cloud Implementation is delayed
Lack of direct ground to cloud connection impacts performance
JL lacks resources to test and develop on tight schedule

' & AAM Tool Kick-Off

Application and Activity Management Tool (AAM)	Notes
Brainstorm with IN SMEs	Testers and trainers have been identified at CPC-O and IN Missions.
Requirements Gathering session with CN (CPC-E and CPC-O)	
Ongoing Engagement with IN SMEs to gather requirements	

d AAM Development

Application and Activity Management Tool (AAM)	Notes
Develop AAM in the Cloud	Missions to first test Chinook include Shanghai, Abu Dhabi, Sao Paulo, Mexico City, Rome and RROC
Identify, engage and train AAM Champions	
Test AAM in STG in Journey Lab	
Test AAM in STG with CPC-O, CPC-E and IN	
Develop AAM User Manual & Training Videos	

unction Development

Application and Activity Management Tool (AAM)	Notes
Test AAM in PROD in Journey Lab	MS Dynamics holds strong potential for efficiency gains to be made with a well-designed AAM fully leveraging automated work flows and activities.
Test AAM in PROD in IN and CN	
Fix AAM Bugs as identified	
Test Automation Capabilities	
Widen AAM Roll-Out to Additional Users/Offices	
Risk Function Requirement Gathering	

Integrate Risk Indicators with AAM	

on via Ground to Cloud

Tool and AAM Work Fully Merged
y-based processing concerns
lines

n Strategies

Mitigation Strategy
Ops Senior Management to engage IT if necessary
Effective Change Management strategy that emphasizes how the tool will evolve based on user input
Clear communications surrounding what will be automated (administrative tasks) freeing up resources for more complex work
Engage key stakeholders early in the process; follow GoC guidelnes on AI
Continue to push the boundaries of what can be accomplished without direct connection
Gradual roll-out to test performance and identify potential problems quickly
Temporary support from other Labs and IN as needed for testing, feedback and development

Completed
Ongoing
Pending

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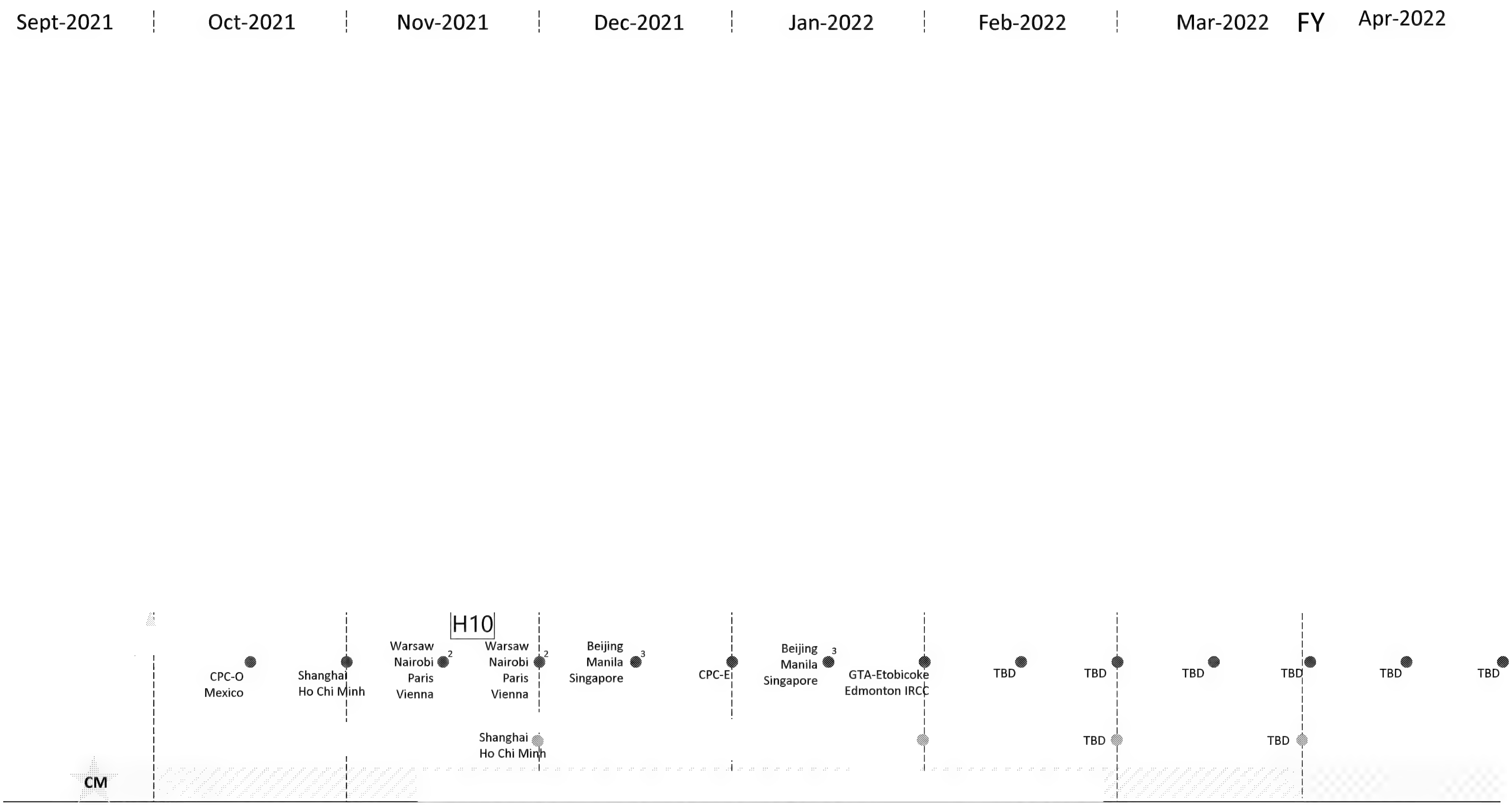
PLAN V.1



1.
2.
3.

Slide 1

H10 CPC-O Officer Tool mid November. Lets us figure out the TRV refusal thing.
Harrison.Kevin, 2021-10-12

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OFFICER TOOL CONTACTS (Not Champions list)

INTERNATIONAL NETWORK	
Shanghai	(MPM) (Mod 3 and 4 lead)
Warsaw	(MPM), (Area Expert)
Nairobi	(MPM), (Mod 1)
Mexico	(MPM), (Area Lead)
Ho Chi Minh City	(MPM)
Paris	(MPM), (Area Expert)
Beijing	(MPM), (Area Expert)
Manila	(MPM)
Singapore	(MPM), (Area Expert)
Vienna	(MPM), (Area Expert)
Bogota	
TBD	TBD
TBD	TBD

INTERNATIONAL NETWORK (continued)	
TBD	TBD
TBD	TBD
TBD	TBD

CENTRALIZED NETWORK	
CPC-O	IRCC.CNHQTR-RTACRC.IRCC@cic.gc.ca
CPC-E	IRCC.CNHQTR-RTACRC.IRCC@cic.gc.ca

DOMESTIC NETWORK	
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GTA-Etobicoke	Andrew Ebrahim

Page 208

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Warsaw	(MPM), (Area Expert)
Nairobi	(MPM), (Mod 1)
Mexico	(MPM), Alyssa Frohberg (Area Lead)
Ho Chi Minh City	(MPM)
Paris	(MPM), (Area Expert)
Beijing	(MPM), (Area Expert)
Manila	(MPM)
Singapore	(MPM), (Area Expert)
Vienna	Greg Chubak (MPM), Annie Pageau (Area Expert)
Bogota	
TBD	TBD
TBD	TBD

INTERNATIONAL NETWORK (continued)	
TBD	TBD
TBD	TBD
TBD	TBD

CENTRALIZED NETWORK	
CPC-O	IRCC.CNHQTR-RTACRC.IRCC@cic.gc.ca
CPC-E	IRCC.CNHQTR-RTACRC.IRCC@cic.gc.ca

DOMESTIC NETWORK	
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GTA-Etobicoke	Andrew Ebrahim